Department Mass Update (DMU) eForm Training
Training Agenda:

1. DMU overview and process flow
2. How to complete the DMU
3. Form routing and approvals
4. Viewing the DMU form status
What is the DMU?

- DMU is the tool used to update employee salaries for the new fiscal year.
- Edit information for an entire department on a single eForm.

Why is the DMU Important?

Campus and U of U Health – Academic departments will use the DMU eForm to

- Make corrections to the ‘Budgeted’ employee population that was budgeted in the EPM system.
- Update ‘Non-Budgeted’ employee compensation rate, FTE, home dept or supervisor.
EPM Process

- **U of U Health - Academic departments** and **Campus departments**, the salary information entered in EPM will be loaded into PeopleSoft prior to the DMU opening.

This portion of the budgeting process has been completed.
DMU Mass Update (DMU) eForm Process

Step 1:
- Review accuracy of all data in D-Jobs
- Is ALL data accurate?
  - Yes: End
  - No, incorrect data: No, Job Changes Needed
  - No, incorrect data: Other Job Changes Needed

Step 2:
- Change distributions in D-Jobs or Edit Job eForm
- End

Step 3:
- Start DMU eForm
- Select EE population
- Enter changes for selected EE population

Step 4:
- Dept Head approves
- Dept Head approves

Step 5:
- University Health Academics Budget Office approves
- Form executes to PS
- (when applicable)

Use DMU eForm to change salary, FTE, home dept or supervisor
Processing Dates
(approximated)

- 1st Monday in June
  - Review D-Jobs and update distributions
  - Review DMU eForm approvers

- 2nd Monday in June
  - DMU eForm Opens for 2 weeks

- 3rd Friday in June
  - DMU eForm Closes

Check DMU website for EXACT dates
https://www.hr.utah.edu/serviceTeams/FY.php
Begin with the end in mind.

Just remember, the goal of this process is to make sure everyone’s pay is correct effective July 1st.
• Consider any other changes that may be occurring in your department on or around July 1st.

• Gathering all of this information prior to the DMU opening can help you identify any employees that might need special consideration and give you time to work with your HR team to form a game plan, if needed.
ALLOWABLE CHANGES

1. Compensation Rate
2. FTE (must remain in same benefit category)
3. Home Department
4. Supervisor ID
5. Staff Terminations
6. Faculty Summer Pay Terminations

ALL CHANGES EFFECTIVE JULY 1ST
With the exception of faculty summer pay terminations which can be effective through 8/16
Review accuracy of data loaded in D-Jobs

- Log into CIS
- Select *HR Administrative Services* from the drop down menu
- Click on *Dept. Job Summary (D-Jobs)* tile
Enter “As Of” Date as the beginning of the fiscal year, 7/1/YYYY
Review data for accuracy

- Click *Show Distributions*
- If all data is accurate, NO further action needed.
- If no distribution changes are needed, submit a DMU once it opens.
- If distribution changes are needed, see the next slide.
If distributions need to be changed:

- Change the “As Of” date back to the current date
- Click on red “D” to the left of the employee name to make changes and save.
DMU Approvers

• Only department head and department head proxies can approve a DMU. Alternates do not have access to approve a DMU.

PROXIES

• It is important to review your approvers and confirm they are available prior to submitting the DMU.

ALTERNATES
To find out who the department approvers are, go to *HR Administrative Services* in CIS. Then click on *HR Human Resources Info Library* (HRIL).

Click on *Security* folder, then *HR ePAF role by DeptID*.
• Enter Dept ID for the second Department/Org Head level (this is the dept/org that the department rolls up to)

Example: if the DMU is for department 00089, the second Dept/Org ID is 00081.

• Check DeptID Rollup

• Click Get Results
Remember, ePAF Alternates cannot approve DMU eForms.
Initiating the DMU is just like other eForms

- Log into CIS
- Select *HR Administrative Services* from the drop down menu
- Click on the *eForms* tile
Click on **Start a New eForm**
Click on ePAF

Start a New eForm

ePAF
Click here to process Personnel action eForms like Hire, Edit Job, Change Employment Status, Update Employee Personal Data & Manual Request for employees in your department.

Return to HR Electronic Forms (eForms) Home page

Click on Submit a Department Mass Update Request

Submit a Department Mass Update Request
Use this form to submit a Department Mass Update Request. *NOTE: This eForm works best in the MOZILLA FIREFOX browser, on both PC and Mac.*
Submit a Department Mass Update Request
Enter *Reporting Department ID* and click *search*.
Select *Budgeted* or *Non Budgeted* employees:

- U of U Health – Academic and Campus departments may have employees in both groups and may need to submit 2 DMU forms, one for each group.
Difference between Budgeted and Non Budgeted

**Budgeted:**
- Used by both Campus and U of U Health – Academics
- Budgeted individually by employees
- Employee’s budget information is loaded into PeopleSoft
- If information is correct, no DMU change is needed

**Non Budgeted:**
- Used by both Campus and U of U Health – Academics
- Not included individually in budget “snapshot”
- No budget information loaded to PeopleSoft
Excluded Employees

- This page will appear only when someone has a pending ePAF.
- Changes on the DMU form are not allowed for anyone on the excluded list.
Two Options for Excluded Employees

1. WAIT UNTIL PENDING FORM(s) ARE PROCESSED
   • Exit the DMU and start again once the pending form has executed to the system.
   OR

2. CONTINUE SUBMITTING THE DMU
   • Any changes to someone who is excluded would need to be submitted on an Edit Job ePAF.
Consider the following:

• What is the pending ePAF trying to accomplish?

AND

• Does this person have any changes that need to be made effective 7/1?
Excluded employee does **not** have a change effective 7/1.

No need to hold up the process if their information is not being updated.

**EXAMPLE:**

- Pending ePAF
- Job Reclassification
- Salary increase
- Effective 6/1
- **No** 7/1 salary increase or other data change

Continue with DMU
Excluded Employees

- Check the *Exclusions Acknowledgement* box and click *Next*. 
The DMU eForm

- **Effective Date** is always 7/1.

- **Action/Reason** of PAY/FYF will show in D-Jobs once the form saves to the system.
Entering and Applying % Increase

- **Enter % Increase** can only be used for Non Budgeted group.
- Once **Apply Increase** button is clicked it is grayed out and then % increase is applied to all employees on the form.
- To make changes to the **Enter % Increase** please start a new form.
- Percentages and comp rates can still be changed individually on each row even after clicking Apply Increase.
Entering and Applying % Increase

- *Chng % and New Comp Rate* are linked and will automatically adjust when one field is changed.
- Employees with multiple jobs in this department will have multiple rows, be aware of which record is being edited.
**Compensation Frequency and Future Rows**

- **CF** stands for compensation frequency, which shows how the employee is being paid; hourly (H), annual (A), or contract pay (C).

- **Future Rows** link shows row(s) that are effective after 7/1. Click the link to see the data.
• The *Future Rows* link will display this informational box.
• *Evaluate* how this information does or does not impact what is being submit on the DMU for this person.

In this example a future pay adjustment effective 7/21 is already in the system. If a 7/1 pay change is needed AND it should replace the 7/21 PAY/ADJ it is recommend that an Edit Job ePAF be submitted for this employee.
The DMU eForm

- Click on the column titles to sort data as needed.

- Be sure to use the arrows on the right to navigate to additional pages to review all employees.
Changes can also be made to:

- Home Department
- FTE
- Compensation Rate
- Supervisor ID
- Staff terminations
- Faculty summer terminations
Terminations

- Click the *Term* box for staff terminations effective 7/1.

- Click the *Summer Term* box for faculty summer terminations and enter a termination date. Allowed dates are between 7/1 – 8/16.
Save For Later will:

- Save your changes
- Keep you on the eForm
- NOT start approvals

Use the Save For Later button often.
Complete a form you have saved for later

**HR Electronic Forms (eForms) Home page**

- Start a new eForm
  - Start a new eForm, which will then be routed to the appropriate approvers.
  - Start a new eForm

- Resubmit, Change, or Withdraw an eForm
  - Make changes to an eForm that has been recycled or needs to be updated. Only forms that have not had final approval or been processed into the system will be accessible.
  - Resubmit, Change, or Withdraw an eForm

- View an eForm
  - View a recently submitted eForm, including information about its handling so far. eForms submitted in the last month are listed here. This is a read-only view.
  - View an eForm
  - Return to eForms Home Page

- Search by eForm ID or by Department ID

- Click on Resubmit, Change or Withdrawn then select Update Department Mass Request.

**Update Department Mass Request**

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

**Search Criteria**

- **eForm ID begins with**
- **Workflow Form Type begins with**
- **Workflow Form Status begins with**
- **Original Operation begins with**

**Dates**

- **Originated Date From**
- **Originated Date Thru**

Limit the number of results to (up to 300): 300

**Buttons**

- Search
- Clear
- Basic Search
- Save Search Criteria
• You can pick up right where you left off.
• Edit, save and exit the form as many times as needed.
• Make sure each row has been marked as “Review Complete.”
• Each box can be checked individually, or use “Check/Uncheck All.”
When ready, add any comments and click Submit or Resubmit to begin the approval process.

Note, if the form was saved for later the button will appear as Resubmit.
Congratulations! The DMU eForm is now routing for approvals!
Campus Department Routing:

#1
Org Head Approves

#2
Org Head Approves

Executes to PeopleSoft

U of U Health–Academic Routing:

#1
Org Head Approves

#2
Org Head Approves

#3
Budget Office Approves

Executes to PeopleSoft
Department Head or proxy approvers can either use the link in the ePAF email notification or navigate to their worklist in CIS to approve the DMU.
• Reviewing the DMU is similar to reviewing other eForms.
• The reviewer clicks next to advance through each page.
Be sure to navigate through ALL pages when evaluating.

### Current Department Info
- **eForm ID**: 760104
- **Department**: 00288, Equal Oppor - Afirm Action
- **Effective Date**: 07/01/2018
- **Action**: PAY, Pay Rate Change
- **Reason Code**: FYF, FY Increase
- **Enter % Increase**: 2.00

### Employees in Active and Leave status

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<th>Name</th>
<th>Emp ID</th>
<th>Emp Record</th>
<th>Job Code</th>
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<th>Current Comp Rate</th>
<th>CF</th>
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<th>Term</th>
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Approve, Deny, or Recycle the eForm

- APPROVE: Moves form to the next approver or sends to system (if final approver)
- DENY: Ends the form and a new form would need to be started
- RECYCLE: Sends form back to the initiator. *Remember to enter comments first.
Wondering where is the eForm? or Whose worklist it is in?

Go to eForms Home Page and click on “View an eForm”.

eForms Home Page

- **My Worklist**
  Work the items that have been routed to you.

- **ePAF**
  Click here to process Personnel action eForms like Hire, Edit Job, Change Employment Status, Update Employee Personal Data & Manual Request for employees in your department.

- **Employment Eligibility Verification (I-9/E-Verify)**
  Click here to process an I-9 or E-Verify form for both new and existing employees in your department.

- **Evaluate an eForm**
  Participate in the approval process for an eForm. This link allows you to search for the eForm you want to evaluate.

- **View an eForm**
  View a recently submitted eForm, including information about its handling so far. eForms submitted in the last month are listed here. This is a read-only view.
To search enter:

- eForm ID

Or

- Form Type = DMUF and Department ID
All DMU eForms will show in the list. Click on the desired eForm.
At the end of the eForm

• Click on *Who can work this form?* to see who can currently approve.
• The Process Visualizer shows where the form is in process.
• The Transaction Log shows a history of what has happened so far.
Once the form shows *Executed* in the transaction log it has saved to the system and is now fully completed.

- Go to D-Jobs and do a final check that **all** data is correct as of 7/1.
- If needed, submit individual Edit Job eForms.
• Have all submissions and approvals completed prior to the close date and time.

• If needed, multiple DMU eForms can be submitted for each department.

• Consider timing. The last eForm saved is what takes effect in the system.

• ABAs are updated daily.

• Have questions? Check DMU website for FAQs and other information.  
  https://www.hr.utah.edu/serviceTeams/FY.php

• Contact your HR Team with additional questions.