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?

- For CAMPUS employees: if the DMU is not submitted, employees will not receive any salary increases effective 7/1 which may cause them to be paid incorrectly.
- For U of U Health – Academic employees: the DMU is used to update non-budgeted employees and make changes or corrections needed in the budgeted category.
EPM Process

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

- **Campus departments**, no salary information from EPM is loaded into PeopleSoft meaning any and all salary changes need to be submitted using the DMU.

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

**Step 1**
- Review accuracy of all data in D-Jobs
- Is ALL data accurate?
- Yes: End
- No: Job Changes Needed
- No: Incorrect Data
- Change distributions in D-Jobs or Edit Job eForm
- End

**Step 2**
- Start DMU eForm
- Select EE population
- Non Budgeted (use by ALL)
- Budgeted used only by U of U Health-Academics
- Enter changes for selected EE population
- Dept Head approves
- Dept Head approves
- University Health Academics Budget Office approves
- Form executes to PS
- End

**Step 3**
- Other Job Changes Needed
- End

**Step 4**
- Change salary, FTE, home dept, supervisor or terminate

**Notes:**

- **U of U Health-Academics** - Use DMU eForm to change salary for any Non-Budgeted employees and/or correct salary for Budgeted employees.
- **Campus** - Use DMU eForm to change salary, FTE, home dept or supervisor for Non Budgeted employee population only.
Processing Dates
(approximated)

- 1\textsuperscript{st} Monday in June
  - Review D-Jobs and update distributions
  - Review DMU eForm approvers
- 2\textsuperscript{nd} Monday in June
  - DMU eForm Opens for 2 weeks
- 3\textsuperscript{rd} 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

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 departments may have employees in both groups and may need to submit 2 DMU forms, one for each group.

- **Campus departments** will *only* use the Non Budgeted group.
Difference between Budgeted and Non Budgeted

**Budgeted:**
- Process used *only* by 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”
- Employees budgeted together as a lump sum
- 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.

Continue with DMU

EXAMPLE:

✓ Pending ePAF
✓ Job Reclassification
✓ Salary increase
✓ Effective 6/1
✓ No 7/1 salary increase or other data change
Excluded Employees

- Check the *Exclusions Acknowledgement* box and click *Next*. 

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### Department Mass Update

**Step 2 of 5: Employees Excluded**

The employees listed on this page will not be updated with changes requested in this eForm because they have a pending ePAF.

**Current Department Info**

- **eForm ID**: 871879
- **Department**: 00288 (Equal Oppot - Affirm Action)
- **Effective Date**: 07/01/2018

**Form Data**

<table>
<thead>
<tr>
<th>Empl ID</th>
<th>Empl Rec</th>
<th>Name</th>
<th>eForm ID</th>
<th>Exclude Type</th>
<th>FTE</th>
<th>New Comp Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>00991252</td>
<td>CEPHALOPOD, URSULA</td>
<td>871846</td>
<td>Pending ePAF</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Form Messages**

<table>
<thead>
<tr>
<th>Message Text</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exclusions Acknowledgement</td>
<td>I understand that the above listed employee(s) will not be updated through this Department Mass Update eForm. Once this eForm executes, if necessary, I will submit individual ePAF’s to process changes for the listed employee(s).</td>
</tr>
</tbody>
</table>
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 submitted 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

- Search by eForm ID or by Department ID

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

![Employee List](image)

**Check/Uncheck All**

**Close**
**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!
DMU Routing
Campus Department Routing:

1. Org Head Approves
2. Org Head Approves
3. Executes to PeopleSoft

U of U Health–Academic Routing:

1. Org Head Approves
2. Org Head Approves
3. Budget Office Approves
4. 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.

<table>
<thead>
<tr>
<th>Step 3 of 4: View Employee Changes</th>
</tr>
</thead>
<tbody>
<tr>
<td>View the form data below. Click Next for the form History page.</td>
</tr>
</tbody>
</table>

**Current Department Info**
- **eForm ID**: 760104
- **Department**: 00288 Equal Oppor - Affirm 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**

<table>
<thead>
<tr>
<th>Review Complete</th>
<th>Name</th>
<th>Emp ID</th>
<th>Emp Record</th>
<th>Job Code</th>
<th>Description</th>
<th>Home Dept</th>
<th>FTE</th>
<th>Current Comp Rate</th>
<th>New Comp Rate</th>
<th>Term</th>
<th>Summer Term</th>
<th>Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>BLACK,SIRIUS</td>
<td>00610781</td>
<td>0 0091</td>
<td>Custodian</td>
<td>00288</td>
<td>0.48</td>
<td></td>
<td>7,500.000</td>
<td>7,580.000</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>DIGORY,CEDRIC</td>
<td>00414599</td>
<td>1 0176</td>
<td>FroSr</td>
<td>00288</td>
<td>1.00</td>
<td></td>
<td>268353.010000</td>
<td>273720.030000</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>DIGORY,CEDRIC</td>
<td>00414599</td>
<td>0 0176</td>
<td>FroSr</td>
<td>00288</td>
<td>1.00</td>
<td></td>
<td>261265.210000</td>
<td>205265.510000</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>DUMBLORE,ALBUS</td>
<td>06009555</td>
<td>0 0512</td>
<td>ExecSecr</td>
<td>00288</td>
<td>1.00</td>
<td></td>
<td>17,000.000</td>
<td>17,510000</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>GRANGER,HERMIONE</td>
<td>00586397</td>
<td>0 0125</td>
<td>Asc Prof</td>
<td>00288</td>
<td>1.00</td>
<td></td>
<td>78273.700000</td>
<td>79829.170000</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>LONGBOTTOM,NEVILLE</td>
<td>00501177</td>
<td>0 0126</td>
<td>Asc Prof</td>
<td>00288</td>
<td>0.75</td>
<td></td>
<td>82968.000000</td>
<td>84527.360000</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>PETTIGREW,PETER</td>
<td>00617135</td>
<td>0 0072</td>
<td>StudRsch</td>
<td>00288</td>
<td>0.20</td>
<td></td>
<td>17,310000</td>
<td>18,000000</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>POTTER,HARRY</td>
<td>00008740</td>
<td>0 0048</td>
<td>EOConsult</td>
<td>00288</td>
<td>1.00</td>
<td></td>
<td>82400.000000</td>
<td>84048.000000</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>SNAPE,SEVERIS</td>
<td>06008392</td>
<td>0 1012</td>
<td>DirOps</td>
<td>00288</td>
<td>1.00</td>
<td></td>
<td>125000.000000</td>
<td>127500.000000</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Check / Uncheck All**
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”.

- **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, individual Edit Job eForms can be submitted.
• 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.