**Personnel Systems Reporting**

A guide to accessing management reports related to Human Resources and Academic Personnel through Advance, MPM, and Weblinks.

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<td>Determine campus locator information.</td>
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**To access these reports:**
1. Log into Weblinks* through MyAccess
2. Click “Go to Weblinks Menu” in the upper left corner.
3. Select the report you would like to run
4. Enter the parameters of your desired report and click “start”
5. Your desired report will run in the browser window; the report can be exported by clicking the PDF and Excel buttons in the upper left corner of the page.

For detailed instructions with screen shots and tips for report parameters, please see pages 4-9.

*If you need access to Weblinks, please request it through your Department Access Administrator
## Magical PAF Machine (MPM) Reports

Applicable to Comp Plan Faculty only

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<th>Report</th>
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<td>Summary of faculty member’s appointment, compensation, and funding for a fiscal year.</td>
<td>Current and projected snapshot for forecasting compensation and funding, and to help communicate this information to faculty.</td>
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<td><strong>Faculty Compensation Overview</strong></td>
<td>List of faculty members and their compensation summary: X, Y, and Z breakdown, pending advancement action and effective date.</td>
<td>Used to easily determine salary components (X, Y, Z) and forecast when a faculty member has a pending advancement action.</td>
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<td><strong>Compliance Report</strong></td>
<td>Compares appointment and distribution data from previous to current month. Highlights the 13 transaction-types that require advance approval from department, Dean’s Office and/or VPAA Office. For details see page 7.</td>
<td>At minimum, best practice is to check during the four-day end-of-month window between the keying deadline and payroll compute date to ensure transactions were correctly keyed and appropriately approved.</td>
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<tr>
<td><strong>Reconciliation (primarily intended for HR Service Centers)</strong></td>
<td>Nightly run report that compares MPM keying instructions with OLPPS PAN results.</td>
<td>Tool to help analyze and resolve keying mismatches.</td>
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<tr>
<td><strong>Keying Instructions</strong> (primarily intended for HR Service Centers)**</td>
<td>Search by PAF status to generate a list of records in ‘submitted’ or ‘keyed’ status.</td>
<td>Identifies MPM transactions submitted by departments that are ready for OLPPS keying.</td>
</tr>
</tbody>
</table>

**To access these reports:**

1. Log into MPM* through MyAccess
2. At the MPM homepage, select the “Reports” tab.
3. Select one of the 5 reports described above, and filter by name or depcode.
4. The report will appear in your browser, and can be sorted by clicking the header row.

For detailed instructions with screen shots and report details please see page 10-13.

*If you need access to MPM, please email your request to MPMSupport@ucsf.edu

Additional system information:

http://medschool.ucsf.edu/mpm_about/resources/MPMTrainingForManagers.pdf
## Advance Reports

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<td>Security Access</td>
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<tr>
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<td>List of Academic Senate faculty appraisal dates.</td>
<td>Helps to determine faculty who are in need of an appraisal.</td>
</tr>
<tr>
<td>5 Year Review</td>
<td>List of faculty who have not had a review within the last 5 years.</td>
<td>Used to determine faculty approaching/up for 5 year review.</td>
</tr>
<tr>
<td>Academic Leave (Note: does not include data prior to 10/1/2012)</td>
<td>List of faculty who are currently on academic leave and academic leave history.</td>
<td>Determine faculty leave status and history.</td>
</tr>
<tr>
<td>Administrative Search</td>
<td>Search and sort all faculty/NFA in your department to see information about last and next merit/promotion with ability to drill down for detail on individuals.</td>
<td>View important information and sort as needed to know the status of advancement actions for your faculty.</td>
</tr>
</tbody>
</table>

### Advancement Eligibility List

Available upon request from your HR generalist.

### To access these reports:

1. Log into Advance* through MyAccess
2. At the Advance homepage, select the “Reports” tab.
3. Select 1 of the 5 reports described below (please note that the Academic Leave report data will be available after Oct. 1st)
4. The report will appear in your browser, and a csv report can be sorted and saved using Excel.

### For Administrative Search:

1. Log into Advance through MyAccess
2. At the Advance homepage, select the “Search” link.
3. Input search criteria; sort by category as needed.

*For detailed instructions with screen shots, please see page 14.*

**NOTE:** Advance is a relatively new system, and efforts are ongoing to improve data accuracy. If you suspect data for your department/faculty are incorrect, please contact your generalist.

*If you need Administrator access to Advance to view reports, please request access through your department’s access administrator. Access administrators will need to complete this form: [http://help.ucsf.edu/custom/advance_request.jsp](http://help.ucsf.edu/custom/advance_request.jsp). If you need Administrator Plus access to Advance (to view components of individual active packets) your chair or ORU director should request access by emailing AdvanceProject@ucsf.edu.*
Weblinks Detailed Instructions

1. Log into Myaccess (myaccess.ucsf.edu)
2. Select “Weblinks” (Left hand column, under App name)
3. Click “Go to Weblinks Menu” to view available reports
4. Select the report that you would like to run.
5. Once the report has been selected, determine and enter parameters for running your desired report.

6. Select “Start” to run and view your report. You can also view your report in PDF or Excel using the export buttons.
**Weblinks Tips for Determining Report Parameters**

**Payroll Appointment Distribution Report**

*Report Options for Payroll Distribution*

(*) - At least one of these fields must be selected.

- All other fields can be left blank if unknown or not desired

Begin Dist End Date: 07/2012  End Dist End Date: 12/9999

Sort/Total: Department, Employee, Appt, Dist

Output Destination: Screen

Department Code (*):

Dept Options: HOME

DPA (*):

To:

Search

Fund (*):

To:

Search

Program Code:

Search

Title Code:

To:

Search

Sub Range:

To:

Search

Personnel Pgm Code: PSS & MSP

Appt Type: ALL

Include WOS: N

Off/Above: ALL

Change if you would like to include without salary (WOS) employees

Change if you would like to see only above or off-scale employees

**(OLD) Hire Date & Salary**

*Report Options for Hire Date and Salary*

(*) - At least one of these fields must be selected.

- All other fields can be left blank if unknown or not desired

Sort/Total: Dept Code, Title Code, Emp Name

Output Destination: Screen

Department Code (*):

Search

Title Code:

To:

Search

Personnel Pgm Code: PSS & MSP

(*) - At least one of these fields must be selected.

^ Leave blank unless results are desired for a specific title
Weblinks Tips for Determining Parameters (Continued)

**Salary/Service/Stat/LOA**

- **Report Options for Salary/Service/Status/LOA Report**
  - (*) - At least one of these fields must be selected.
  - All other fields can be left blank if unknown or not desired

- **Sort/Total:**
  - Emp Name

- **Output Destination:**
  - Screen

- **Department Code (*)&:**
  - Search

- **Title Code:**
  - To:
  - Search

- **Personnel Pgm Cd:**
  - PSS & MSP

- **Class Title Outline:**
  - ALL
  - Leave as ALL unless desire to filter by researcher CTO codes: professor, postdoc, dean, etc.

- **Include WOS:**
  - N
  - Change if you would like to include without salary (WOS) employees

- **Employee Status:**
  - All Non-Separated
  - Leave as is to report all current Active status employees

- **Leave Acrnul Code:**
  - EXCLUDE

- (*) - At least one of these fields must be selected.

**OLD** **Salary Review/Preliminary Merit Roster**

- **Report Options for Salary Review/Preliminary Merit Roster**
  - (*) - At least one of these fields must be selected.
  - All other fields can be left blank if unknown or not desired

- **Nxt Sal Rev Date:**
  - 10/2023

- **Sort/Total:**
  - Employee

- **Output Destination:**
  - Screen

- **Department Code (*)&:**
  - Search

- **Title Code:**
  - To:
  - Search

- **Personnel Pgm Cd:**
  - PSS & MSP

- **Appt Type:**
  - ALL

- **Title Unit Cd:**
  - ALL
  - Leave as ALL unless desire to filter by Title Unit Code: CX-Cue Clerical, NX-CNA Nurses, RX-SRAs, etc.

- **Appt Rep Code:**
  - ALL
  - Leave as ALL unless desire to filter by appointment rep code (determines eligibility of whether an appt. can be represented)

- **Class Title Outline:**
  - ALL
  - Leave as ALL unless desire to filter by researcher CTO codes: professor, postdoc, dean, etc.

- **Next Sal Rev Code:**
  - ALL

- **TPS Health Flag:**
  - ALL

- (*) - At least one of these fields must be selected.
### Preliminary Merit Roster

**Report Options for Preliminary Merit Roster:**

(*) - At least one of these fields must be selected.

- **Nat Sal Rev Date (Cur.):**
- **Sort/Total:**
- **Output Destination:**
- **Department Code (*):**
- **Title Code:**
- **DOS Code:**
- **Personnel Pgm Cd:**
- **Appt Type:**
- **Title Unit Cd:**
- **Appt Rep Code:**
- **Class Title Outline:**
- **Next Sal Rev Code:**
- **TPS Health Flag:**
- **Control Percentage:**

All other fields can be left blank if unknown or not desired.

*Leave as ALL unless desire to filter by Title Unit Code: CX-Cue Clerical, NX-CNA Nurses, RX-SRAs, etc.*

*Leave as ALL unless desire to filter by appt. rep code (determines eligibility of whether an appt. can be represented)*

*Leave as ALL unless desire to filter by Title Unit Code: CX-Cue Clerical, NX-CNA Nurses, RX-SRAs, etc.*

*Leave as ALL to report all grade level employees*

*Leave as is to report all current Active status employees*
Weblinks Tips for Determining Parameters (Continued)

Separations Report

Report Options for Separations Report

(*) - At least one of these fields must be selected.

(*) - At least one of these fields must be selected.

All other fields can be left blank if unknown or not desired

From Separation Date: 01/0001
To Separation Date: 10/2012

Sort/Total: Emp Name
Output Destination: Screen
Department Code (*):
Separation Reason: ALL

Select fields desired in results

Search

Start Reset

Start Reset
**MPM Detailed Instructions**

1. Log into MPM through MyAccess (myaccess.ucsf.edu)
2. From the home page, faculty can be searched by name or department.

3. For Reports, select the Reports tab (shown above) to access the system-generated reports.
4. On the Reports tab, select the desired report. Additional report descriptions can be found on the following page.
**MPM Faculty Funding Plan (FFP) Report Detail**

**Description:**
The FFP summarizes a faculty member’s appointment, compensation, and funding for fiscal year. It provides financial and HR administrators an easy to read snapshot to help verify that payroll actions are processed as intended and helps users communicate the information to faculty in a straight forward way.

**Methodology:**
When a faculty appointment is renewed, the FFP shows the projected compensation and funding sources based on the information inputted in the MPM. Over the course of the year, the report pulls actual payroll data for the months that have already occurred and makes projections based on the planned payroll actions in the MPM. Because the source for actual payroll data is the CPE (distribution of payroll expense), the report incorporates any retroactive adjustments such as PETs (payroll expense transfers) and LX/RXs.

Benefits expense is projected using historical benefits information if available. The MPM calculates the faculty member’s historical benefits rate for the previous 12 months, and then adds three percentage points to account for the increases in employer contribution. (For example, Dr. Jones earned $120,000 and had benefits expense of $24,000, resulting in 20% benefits rate. The MPM uses a 23% benefits rate (20% plus 3%) to project Dr. Jones’ benefits expense for the current fiscal year.) If there is no historical benefits data for the faculty member, the system assumes a 25% benefits rate. It is expected that this methodology is somewhat conservative and therefore will overestimate the benefits expense. Over the course of the year, the projected benefits expense is replaced by actual benefits expense for the months that have already occurred.

**When should the report be used?**
- Preparers (staff who plan faculty compensation and funding) can use the report when they are preparing payroll actions to verify that they changes they enter into the MPM generate the intended results, e.g.,
  - Did the right percent effort get charged to the right DPA-fund for the right months?
  - Is the faculty member’s merit or promotion accurately reflected?
  - Was an NIH/CIRM cap applied to the appropriate DPA-funds?
- Department reviewers (e.g. RSAs, division administrators, financial managers, and department managers) can share the report with their chairs, chiefs, and faculty at any time to review compensation levels and funding sources
  - What is the faculty member’s negotiated salary? Additional compensation?
  - How much will a particular DPA-fund be shared for the faculty member’s salary & benefits expense?
  - What joint appointment does this faculty member have?
MPM Compliance Report Detail

Description:
The report is designed to help MPM users review faculty payroll actions that have been keyed into OLPPS to ensure that errors are caught and corrected before payroll is processed each month. The report highlights payroll changes that require approval be the Deans’ Offices and/or Office of the Vice Provost of Academic Affairs (VPAA), including faculty advancements, changes to assignments of state FTEs, and various policy exceptions. By highlighting particular transactions that require their oversight, rather than reviewing all individual transactions.

Users should be able to review the records on the report to confirm that the appropriate approvals were obtained, and to identify where keying errors have occurred.

Methodology:
The Compliance Report compares appointment and distribution data from the previous month to the current month. It highlights 13 types of transactions that require advance approval from a department, Dean’s Office, and/or VPAA:

- Faculty Appointments:
  1. Changes to BSE distributions
  2. Senate faculty appts. reduced to <100%
  3. Changes to % FTE
  4. New recall appointments
  5. Leave of absences
  6. Appts. and advancements
  7. Separations and retirements
  8. Emeritus status for all senate faculty after separation

- Faculty Compensation:
  9. Faculty with ≤50% appointment not at scale 0
  10. Changes to stipends (BYN, ST1, STP, RG1)
  11. Changes in negotiated compensation >10%
  12. Changes to academic programmatic unit (APU)

- Funding Sources
  13. New use of interdepartmental funds

The report data is pulled from Ad Hoc and is updated nightly. Please be aware that there is a one-day lag between when information is keyed into OLPPS and when the changes appear on this report. An update keyed into OLPPS before 6PM on Monday will show up on this report on Tuesday (except for rare occasions when it may take up to two days).

The report lists the names of faculty who fall into each of the 13 transaction types. Each faculty name is a hyperlink which takes the user to a snapshot of the updated distributions and previous month’s distributions.
**MPM Compliance Report Detail (continued)**

**When should the report be used?**

- At a minimum, keyers should check the report during the four-day end of month window between the Quick Win (QW) keying deadline and the payroll compute date, in order to spot keying errors before they are processed. However, it is highly recommended that keyers check the report periodically over the course of the month as transactions are keyed into OLPPS. Examples of issues highlighted by the Compliance Report:
  - Did I intend to lower the faculty member’s appointment from 100% to 99.3%?
  - Was the promotion for the faculty member accurately captured?
  - When the faculty member went from compensation plan appointment to non-comp plan (scale 0), were the negotiated salary elements appropriately deleted?

- At a minimum, department reviewers (e.g. RSAs, division administrators, department managers) should check the report during the four-day end of month window between the Quick Win (QW) keying deadline and the payroll compute date, in order to ensure the transactions on the report were appropriately approved. They can also point out keying errors to the keyers. It is highly recommended that department reviewers check the report periodically over the course of the month, to ensure adequate time to catch errors. Please note that this does not change the existing requirement that mandatory PAN reviewers review each transition within two business days. Examples of issues raised by the Compliance Report:
  - Did I expect and approve the use of my department’s DPA-funds on these faculty members from other departments?
  - Were these new faculty appointments and recall appointments approved in advance as appropriate?
  - Was the reduction in appointment for this faculty member intended or a keying error?

- Control Points (e.g. Deans’ Office analysts, VPAA analysts) should check the report during the four-day end of month window between the QW keying deadline and the payroll compute date, in order to ensure that they approve of the transactions on the report. This will give time to the departments to catch inadvertent errors.
Advance Detailed Instructions

1. Log into Advance through MyAccess (myaccess.ucsf.edu)
2. For Administrative Search, on homepage, search, sort and download faculty information.
3. For Reports, select the Reports tab (shown below in the upper right hand corner) to access the system-generated reports.
4. On the Reports tab, select the desired report. The report may be exported to PDF or Excel by selecting the desired format.

Additional system information may be found at: http://academicaffairs.ucsf.edu/advance/guidesapas.php