

# PMIS (EPR 421) Keying Guide

*(Update for use by Higher Education Agencies)*

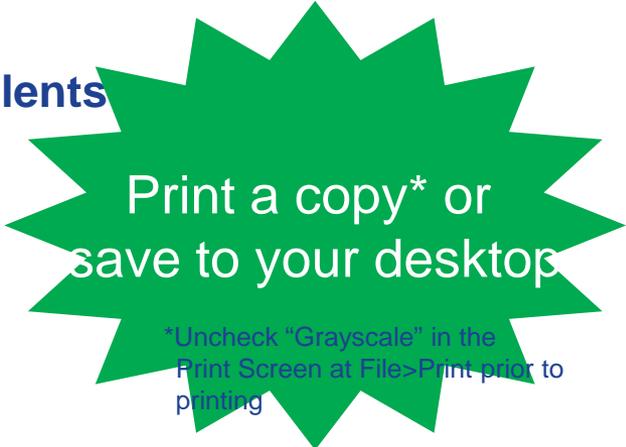


# DHRM is Improving your PMIS Experience

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Print Screen at File>Print prior to  
printing

# Introduction: What is EPR?

## **What is EPR?**

The Employee Position Reports sub-system is part of the Commonwealth of Virginia Personnel Management Information System and is part of the Department of Human Resource Management's mainframe legacy systems in support of HR administration. EPR is primarily a reporting system of staffing levels by type of funding across a broad diversity of executive, legislative, judicial and independent agencies and colleges and universities. EPR uses retrospective monthly reporting and is always one month behind the calendar month and one month behind in reporting out its monthly counts. On the EPR agency record, the high-level staffing rollups are for Classified, Faculty and Wage. Within each high-level staffing rollup there are separate count areas for Employees (FTE's), Positions and Head Counts. There are also count areas for types of funding whether General (GF) or Non-General (NGF) and Restricted or Unrestricted Funding. For the Wage breakouts, there are count areas only for General Fund versus Non-General Fund.

# DOA CIPPS Payroll Audit Tool for EPR

The Dept. of Accounts (DOA) offers an online [CIPPS Payroll Audit Tool \(PAT\)](#) that provides CIPPS Wage Counts that can be used to enter data into both PMIS EPR transactions (EPR 420 and EPR 421) each month. Information on PAT and how to use it can be found at the [DOA Home page](#), in the [CAPP Commonwealth Accounting Policies and Procedures Manual, Volume 3, Section “70700 Financial Information Download System”](#).

The PDF document is entitled, “[70735 Finds: CIPPS Payroll Audit Tool \(PAT\)](#)”. These counts are normally available by the 10<sup>th</sup> or 12<sup>th</sup> of each month for the preceding EPR report month.

The PAT EPR report for higher education will count any employee with object code 1142 or 1142 (faculty) in the following reporting sections according to the FUND (Program Code is not involved) that their pay was charged to:

General Fund – Funds 0100 and 1100

Non-General Fund (Auxiliary) – Fund 0306

Non-General Fund (sponsored Programs) – Fund 0301,0302, 0303, 0308

Non General Funds (E & G) – All other Funds

# EPR421 Higher Ed Monthly Data Entry Procedure

## **(EPR421) Higher Ed**

EPR is reported monthly retrospectively (the month must have ended before you can start reporting) by the 15<sup>th</sup> day of the next calendar month. The 25<sup>th</sup> of each month is DHRM's default run date for the EPR program. For PMIS Higher-Ed agencies, the PME480, created from a PMIS mainframe extract on the last day of the month, pre-populates the salaried employment data fields of the EPR screen. Therefore, PMIS Higher-Ed agencies need only enter wage employment data. Non-PMIS Higher Ed agencies must enter both salaried and wage employment data. Steps to follow are listed below followed by print screens.

### **PROCEDURE:**

- 1. From the EPR Transaction menu screen, first type EPR400 , Agency Number and enter to review the current data for your agency.***
- 2. Then cursor home and type EPR421, Agency Number, the letter F (Faculty ) or C (Classified )then Transmit.***
- 3. Populate effective date as the last day of month you are reporting then Transmit.***
- 4. Populate the number of General fund Empl FTE and Headcount . Include all E&G funds (All other funds not listed) or General Funds. (Funds 0100 and 1100) Do not include non-credit adjunct faculty in the General Fund section.***
- 5. Populate the number of Non General Fund Empl FTE and Headcount. Include all Auxiliary Enterprises (Fund 0306) and Sponsored Programs wages. (Funds 0301,0302,0303,0308)***
- 6. Type EPR400 for your agency to review your transaction for accuracy.***

# EPR421 Call Up Screen for Higher Ed Agency

QTermUTS 4.1.40.0 - [T28753 (Connected to MCB5)]

File Edit View Settings

TPR421

--- 445 PER129NLT 08/07/2012 14:39:16

EPR HIGH-ED AGENCY UPDATE

Agency Number: 246

Classified or Faculty (C or F): C

Xmit.....: |

000002 Screen Call-Up Complete -- Proceed

Type your 3 digit Agency Number in the Agency Field.

Type C for Classified or F for Faculty

# EPR Non-PMIS Agency Classified Higher-Ed Full Screen Update

For Non-PMIS Agencies Monthly Classified and Wage data must be entered

QTermUTS 4.1.40.0 - [T28753 (Connected to MCB5)]

File Edit View Settings Tools Commands Network Window Help

TPR421 24 EPR Classified Higher-Ed Agency Update HIGHER-ED AGENCY UPDATE

----- 479 PER129NLT 08/07/2012

Agency 246 Types 1, 2, 3 Curr-Mon: 063012 Effrt-Mon: \*\*\*\*\* Update

**CLASSIFIED** E+G AUX SPO

\*\*\* General Fund \*\*\* A G D

Agency	Positions	A	G	D
05	Non-Restrtd Positions	0.00	0.00	0.00
	Non-Restrtd Employees	147.80	0.00	0.00
	General Fund ***	120.80	0.00	0.00
	Restricted Positions	0.00	0.00	0.00
	Restricted Employees	0.00	0.00	0.00
05	Non-Restrtd Positions	0.00	39.00	4.00
	Non-Restrtd Employees	0.00	32.00	4.00
	*** Wage ***			
07	General Fund Empl FTE	12.25	0.00	0.00
	General Fund Empl Head Count	17	0	0
08	Non-General Fund Empl FTE	0.00	1.75	0.00
	Non-General Fund Empl Head Count	0	3	0
	*** Funding ***			
29	Total Head Count	121	32	4

End.....

000002 Screen Call-Up Complete -- Proceed

**Enter transaction date as MMDDYY**

**Include all Auxiliary enterprises (Fund 0306) and Sponsored Programs (Funds 0301,0302,0303,0308)**

**Include all E&G funds or General Funds (Funds 0100 an 1100). Do not include non-credit adjunct faculty in the General Fund Section.**

# EPR Non-PMIS Agency Faculty Higher-Ed Update

Monthly Faculty Wage Data must be entered

**NOTE: Adjunct Faculty Wage FTE counts are entered only for the months of June and December. The June report shall include FTE for the period of January 1 through June 30 and the December report shall include FTE for the period of July 1 through December 30.**

TPR421,207,F

EPR HIGHER-ED AGENCY UPDATE

479 PER129MLT

09/07/20

Agency 207 Types 1, 2, 3

Curr-Mon: 063012

Effrt-Mon: \*

\*\*\*\*\*

Enter Effrt-Mon date as MMDDYY

**FACULTY**

	A	G	D
*** General Fund ***			
10 Restricted Positions	0.00	0.00	0.00
Restricted Employees	0.00	0.00	0.00
11 Non-Restr Positions	3180.08	0.00	0.00
Non-Restr Employees	1766.03	0.00	0.00
*** Non-General Fund ***			
13 Restricted Positions	0.00	0.00	0.00
Restricted Employees	0.00	0.00	0.00
14 Non-Restr Positions	0.00	128.50	900.01
Non-Restr Employees			
*** Wage ***			
16 General Fund Empl FTE	0.00	0.00	0.00
General Fund Empl Head Count	508	0	0
17 Non-General Fund Empl FTE	0.00	0.00	0.00
Non-General Fund Empl Head Count	0	28	693
*** Funding ***			
18 Total Head Count	1766	90	658

Adjunct faculty headcounts are entered here monthly

End.....

000002 Screen Call-Up Complete -- Proceed

# EPR PMIS Agency Classified Higher-Ed Update Screen

For PMIS Agencies Enter Monthly Wage Data Only

The screenshot shows a terminal window titled "QTermUTS 4.1.40.0 - [T28753 (Connected to MCB5)]". The main display area is black with green and red text. At the top, it says "TPR421,204 C" with a red circle around the 'C'. Below that is "Agency 204 Typ" and "CLASSIFIED" in red. A callout box points to the 'C' and says: "Include all E&G funds or General Funds (Funds 0100 and 1100). Do not include non-credit adjunct faculty in the General Fund Section." The screen shows "AGENCY UPDATE" with fields for "Curr-Month" (063012), "Effrt-Month" (\*\*\*\*\*), and "Updated" (08/01/2012 16:20:32). A callout box points to the "Effrt-Month" field and says: "Enter Effrt-Month as MMDDYY". Below this is a table of data with blue boxes around the values. A callout box points to the table and says: "Include all Auxiliary enterprises (Fund 0306) and Sponsored Programs wages (Fund 0301,0302, 0303, 0308)." The table data is as follows:

	33.95	0.00	0.00
07 General Fund Empl FTE	33.95	0.00	0.00
General Fund Empl Head Count	266	0	0
08 Non-General Fund Empl FTE	0.00	48.59	33.95
Non-General Fund Empl Head Count	0	122	74

At the bottom, it says "End....." and "000002 Screen Call-Up Complete -- Proceed".

# EPR PMIS Faculty Higher-Ed Update Screen

For PMIS Agencies Enter Monthly Wage Data Only

**NOTE: Adjunct Faculty Wage FTE counts are entered only for the months of June and December. The June report shall include FTE for the period of January 1 through June 30 and the December report shall include FTE for the period of July 1 through December 30.**

```
TPR421,204 F          EPR HIGHER-ED AGENCY UPDATE
----- 440 PER129NLT      08/07/2012
Agency 204  Types 1, 2, 3      Curr-Month      Efft-Month
                                063012          * * * * *
FACULTY          E+G          AUX          SPON
** WAGE **
Adjunct headcounts are entered here monthly;
16 General Fund Empl FTE          52.42          0.00          0.00
   General Fund Empl Head Count    115           0           0
17 Non-General Fund Empl FTE      0.00          0.00          0.98
   Non-General Fund Empl Head Count 0             0           6

End.....

000002 Screen Call-Up Complete -- Proceed
```

Enter Efft Month as MMDDYY

Adjunct headcounts are entered here monthly;

# EPR400 Inquiry Screen showing EPR Record Types and Pages

QTermUTS 4.1.40.0 - [T28753 (Connected to MCB5)]

File Edit View Settings Tools Commands Network Window Help

TPR400 EPR DISPLAY MENU

----- 490 PER129NLT 08/07/2012 16:22:27

State.....

Executive Branch.....

Secretary.....

Parent.....

Agency.....

Type.....

1 - E+G

2 - Aux. Ent.

3 - Spon/Misc

4 - Program Sum

5 - Totals (Default)

Page.....

1 - Classified or General Fund (Default)

2 - Faculty or Non-General Fund

3 - Combined

End.....

000002 Screen Call-Up Complete -- Proceed

Review your EPR data for your higher ed agency after you complete your EPR 421 transaction .

Enter 1 for Classified General Fund or 2 for Faculty non General Fund





# Procedure for Calculation of Faculty Wage Equivalents

The following procedures refer to the calculation of full-time wage equivalencies tied to wage expenditures in the sub-object codes of 1142 and 1145. Wage expenditures in these sub-objects include payments for part-time and adjunct faculty, summer session, and overload assignments, and employed graduate students.

- Faculty wage equivalents will be calculated based on effort, such as lecture hour equivalents. Each institution will include in its compensation plan a written statement establishing the definition of a full-time faculty member based on course or course-equivalent workload. The same workload definition applies to the FTE calculation of wage expenditures.
- Activities that can be considered for conversion to full-time equivalents include direct instructional contact hours, laboratory or studio hours, individualized instruction, administrative duties, academic advising and research and public service activities.
- The lecture hour equivalent determined to be equal to an FTE will be based on a 9-10 month full-time faculty workload. The equivalent may differ from one institution to another.
- The full-time equivalent may not exceed 30 course hours or 30 hours of equivalent activities, unless approved by the Council of Higher Education and the Department of Planning and Budget.
- All employed graduate students who are paid from sub-object 1142 should be included in the reporting of full-time equivalents. The conversion of the graduate student appointment to full-time equivalents will be based on workload assignments in the same manner as other wage (part-time) faculty.

# Definitions

**Wage Employee FTE** is calculated by dividing the total number of hours worked (excluding Lecturers) by the number of work hours in the report month, excluding holidays. Complete the E& G employee section first, and then complete the Auxiliary Enterprises and finally the Sponsored programs.

**Wage Headcount** is a report of the average number of employees (excluding Lecturers) working per pay period. First, add the number of employees for all pay periods within object codes 1141-1144, 1146, and 1148, in each program. Then, divide by the number of pay periods in the report month.

**Faculty Headcount** is a report of the average number of Lecturers working per pay period. First, add the number of Lecturers, object codes 1142 and 1145, by program, then divide by the number of pay periods in the report month.

**Faculty Wage FTE** is the total number of full time equivalent faculty wage employees as determined by the institution's approved formula, that have taught in the report month. Faculty Wage FTE data shall be reported only on the June and December EPR reports.