

Monthly (exempt) to Salaried (non-exempt)

Personnel Instructions

1. Create document using WebDFS BudgetAmendment/Personnel System.
2. Go to the drop down menu and click “Reason Codes”
 - a. From the “Entry Detail” section click on the “Reason Codes” drop down list and choose “X” – FLSA.
3. Go to the “Employee Information” page by selecting it from the drop-down menu and then click the “GoTo” button.
 - a. Change the “Wage Type” to **Non-Exempt**
4. Go to the “Filled Position” page by selecting it from the dropdown menu and then click the “GoTo” button.
5. Select the CLRMN position by clicking on the radio button to the left of the position in the Entry List section. This causes the data to be copied to the Entry Detail section.
6. Modify the position appointment and salary end dates to 11/16/2016 at 8.0 hours.
7. Click the “Save” button. The System Messages should indicate that the information was updated successfully. The information has been cleared from the Entry Detail section.
8. Click on the “PayAuth” link in the Entry List section. This link will take you to the Pay Authorization page.
9. Change the end date of the payroll authorization column to 10/31/2016 @ 8.0. Add another column with the dates 11/01/2016 to 11/16/2016 @ 8.0 hrs. **Remember to adjust the November column for the adjusted amount. A spreadsheet has been provided to the financial director to assist in the adjusted amounts. The steps to manually calculate the adjustment is available in the examples provided.*
10. Click the “Save” button. The System Messages should indicate that the information was updated successfully.
11. Now we need to go back to the “Filled Position” page by selecting it from the dropdown menu and then click the “GoTo” button.

12. There is one row in the Entry List section. This is the information for one of the two positions this person will be paid from... we need to add the CLRTC position now.
13. XXXCLRTCXXA (for position number information you may do one of two things: 1. Go into IMS Budget Amendment System and type at **MODE: 6 SELECT: LP KEY: 2017XXXCLRTC>** (this will give you a list of CLRTC positions being used in FY2017. Choose the next available CLRTC number to start your position. (Looking below the next "CLRTC" for department 099 will be 099CLRTC08A . 2. You may call the University Budget Office at 706 542-2802 and we will be glad to assist you.

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RETRIEVE      TRANSACTION: LINE ITEM POSN BY FY
OPTION: F     TRX: 6LP   KEY: 2017099>
SELECTION:    PRESS ENTER TO VIEW ADDITIONAL SELECTIONS
-----POSITION----- INCUMBENT -----INCUMBENT NAME-----
  FY  DPT TITLE NO/O   SOC SEC   LAST           FIRST           MIDDLE
  1  2017 099 ACCRU L  A
  2  2017 099 AC DPR 01 A
  3  2017 099 CL RMN 01 A
  4  2017 099 CL RMN 02 A
  5  2017 099 CL RMN 04 A
  6  2017 099 CL RMN 07 A
  7  2017 099 CL RTC 01 A
  8  2017 099 CL RTC 02 A
  9  2017 099 CL RTC 03 A
 10  2017 099 CL RTC 04 A
 11  2017 099 CL RTC 05 A
 12  2017 099 CL RTC 06 A
 13  2017 099 CL RTC 07 A
 14  2017 099 CL RTC 09 A
 15  2017 099 CL RTC 10 A
 16  2017 099 CL RTC 12 A
 17  2017 099 CL RTC 13 A

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Fiscal Year and Department Number

14. In the Entry Detail area, key in the information for the second position. The position appointment and salary dates will be 11/17/2016 through 06/30/2017 at 8.0 end hour.
15. Remember to use the new job class code that starts with "0". This will be provided by HR.
16. After keying in all of the information for the new CLRTC position then click "Save"
17. Click on the pay authorization link next to this new CLRTC position we just added.

18. On the payroll authorization page key in the account(s) with object code 51120. The dates will be 11/17/2016 through 06/30/2017 at 8.0 hours. Key in the hourly rate. Change the calculation method to “System” if only one account. If they are paid from more than one account, then key in the revised eft and revised budget for each account and leave calculation method set to “manual”.
19. Click “Save”
20. Select “Budget Amendment Page” from the “Go Where” drop-down menu and click the “GoTo” button.
21. The budget amendment should be completed by the system with the change amount moving from the CLRMN to the CLRTC position.
22. You should now Validate the document and submit. When you click “Validate” button you will get a personnel warning “Total Revised Budget of \$\$\$\$ for position XXXCLRMNXXX does not agree with system calculation \$\$\$\$” – This is fine as long as the difference is the adjusted amount referenced in step 9.

Please contact the University Budget Office at (706) 542-2802 if you have any questions concerning how to prepare the personnel and budget amendment documents for FLSA.

EXAMPLE 4

MONTHLY TO SALARY CONVERSION AS OF 11/17/16

The Business Manager I classification is changing from an exempt position to a non-exempt position as of 11/17/2016. Below are the calculations to end the monthly position and begin the salaried bi-weekly position for someone who is working 100% time and fully budgeted for a full fiscal year appointment.

Step 1		
Exempt (Monthly) rate		
Annual Salary	/	Gross Monthly Pay
		=
# of Pay Periods in Fiscal Year		
		=
\$38,427	/	\$3,202.25
12		

Step 2 - A		
Exempt Position Budget		
Gross Monthly Pay	X	Position Budget for Full Months
		=
		=
# of full months worked (July-Oct)		
		=
\$3,202.25	X	\$12,809
4		

Step 2 - B		
Exempt Position Budget		
Gross Monthly Pay	/	Daily Rate for November
		=
		=
# of working days in November		
		=
\$3,202.25	/	\$145.56
22		

Step 2 - C		
Exempt Position Budget		
Daily Rate for November	X	Exempt position pay for November
		=
		=
# of exempt (monthly) days to be worked in November		
		=
\$145.56	X	\$1,746.72
12		

Step 3 - A		
Non-exempt Position Budget		
Annual Salary	/	Non-exempt (salaried) hourly rate
		=
		=
# of work hours in fiscal year		
		=
\$38,427	/	\$18.404
2,088		

Step 3 - B		
Non-exempt Position Budget		
Non-exempt hourly rate	X	Non-exempt daily rate
		=
		=
work hours per day		
		=
\$18.404	X	\$147.23
8		

EXAMPLE 4

MONTHLY TO SALARY CONVERSION AS OF 11/17/16

Step 3 - C

Non-exempt Position Budget

Non-exempt daily rate	X	# of non-exempt days to be worked in remainder of fiscal year	=	Salaried bi-weekly position earnings
\$147.23	X	162	=	\$23,851.26

Step 4

Combined calculated earnings

Total monthly pay (exempt) (step 2-A+2-C) Full months + Nov.	+	Salaried pay (Non-exempt)	=	Total calculated earnings
\$14,555.72	+	\$23,851.26	=	\$38,406.96

Step 5

Monthly to salaried conversion adjustment

Total position budget	-	Total calculated earnings (step 4)	=	Adjustment
\$38,427	-	\$38,406.96	=	\$20.04

Step 6

Adjust last monthly check

Calculated November pay (step 2-C)	+	Adjustment (step 5)	=	Revised November monthly pay
\$1,746.72	+	\$20.04	=	\$1,766.76

EMPLOYEE PERSONNEL REPORT

UNIVERSITY OF GEORGIA

DOCUMENT NO.	PAGE	DATE	FY	DEPARTMENT PHONE	COLLEGE OR DIVISION

UGA EMPLOYMENT HISTORY
 (C) CURRENT (P) PREVIOUS
 DATE //

PAY TYPE
S

UGA % TIME	ACTION MO DA YR
100 000	11/17/2016

(1) FULL BENEFITS
 (E) EXEMPT (N) NON-EXEMPT (T) TIPPED
 (M) MALE (S) SINGLE (Y) FACULTY RANK
 (F) FEMALE (M) MARRIED (N) NON-FACULTY
 HISPANIC OR LATINO/A
 WHITE AFRICAN AMERICAN ASIAN
 AMERICAN INDIAN/ALASKA NATIVE NATIVE HAWAIIAN/OTH PAC ISLAND

FOR PAYROLL DEPT USE ONLY				COOP. EXT. EMPLOYEES ONLY				PAYROLL PAYMENT DISTRIBUTION	
FED	EXM	STATE EXM	OASDI	RETIRE	GDCP	COUNTY MONEY (PER PAY PERIOD)	UGA SALARY		<input checked="" type="checkbox"/> (1) DEPARTMENT DISTRIBUTION CODE <u>100</u>
			HI	EIC			COUNTY MONEY		
							TOTAL		

TRX	HOME DEPT	SHORT TITLE	POSN NO.	APPT. BEGIN MO DA YR HR	APPT. END MO DA YR HR	JOB CLASS CODE	POSITION TITLE	POS % TIME	C N	FULL TIME ANNUAL SALARY	S C	SUPPLEMENT AMOUNT
	024	CLRMN	05A	07 01 16 00 0	11 16 16 08 0	10457	BUSINESS MANAGER I	1 00000	N	38427		
	024	CLRTC	01A	11 17 16 00 0	06 30 17 08 0	00417	BUSINESS MANAGER I	1 00000	N	38427		

PAYROLL AUTHORIZATION

TRX	HOME DEPT	SHORT TITLE	POSN NO.	ACCOUNT	FISCAL YEAR EFT BUDGET	FROM THRU AMOUNT PER PAY PERIOD / HOURLY RATE	MO DA YR HR	MO DA YR HR	MO DA YR HR
	024	CLRMN	05A	1062GA024000	0 37900 14576		07 01 16 00 0	11 01 16 00 0	11 17 16 00 0
	024	CLRTC	01A	1062GA024000	0 62100 23851		10 31 16 08 0	11 16 16 08 0	06 30 17 08 0
							3202 25	1766 76	18 404
TOTALS							3202 25	1766 76	

REASON CODES
 (X) FLSA

REMARKS
 Fed Retire: N

DOCUMENT NO.	PAGE	DATE	FY	DEPARTMENT/PROJECT
024590002	1 of 1	09/01/2016	17	BUDGET DIVISION
UGAID	LAST NAME	FIRST NAME/INITIAL	MIDDLE NAME/ INITIAL	SUFFIX

BUDGET POSITION

UNIVERSITY OF GEORGIA BUDGET AMENDMENT

TRX	HOME DEPT	SHORT TITLE	POSN NO.	APPT. BEGIN MO DA YR HR	APPT. END MO DA YR HR	JOB CLASS CODE	POSITION TITLE	POS % TIME	C N	FULL TIME ANNUAL SALARY	S C	SUPPLEMENT AMOUNT
		CLRMN	05A	07 01 16 00 0	11 16 16 08 0	10457	BUSINESS MANAGER I	1 00000	N	38427		
		CLRTC	01A	11 17 16 00 0	06 30 17 08 0	00417	BUSINESS MANAGER I	1 00000	N	38427		

BUDGET AMENDMENT (PERSONAL AND NON-PERSONAL SERVICES)

TRX	HOME DEPT	SHORT TITLE	POSN NO.	ACCOUNT	OBJECT	DESCRIPTION	CURRENT EFT	CURRENT BUDGET	CHANGE EFT	CHANGE AMT	REVISED EFT	REVISED BUDGET
		CLRMN	05A	1062GA	000 51110	MONTHLY PAYROLL	1 00000	38427	0 62100	- 23851	0 37900	14576
		CLRTC	01A	1062GA	000 51120	SALARIED BI-WEEKLY			0 62100	+ 23851	0 62100	23851
TOTALS							1 00000	38427			1 00000	38427

FUNDING SOURCE (DEPARTMENTAL INCOME OR CONTINGENCY)

TRX	ACCOUNT	OBJECT	FUNDING SOURCE	CHANGE AMT	+-	REMARKS / REFERENCE

_____ APPROVAL	_____ DATE	_____ APPROVAL	_____ DATE	_____ DEPT HEAD	_____ DATE	_____ VICE PRESIDENT	_____ DATE	_____ CONTRACTS & GRANTS DATE
_____ APPROVAL	_____ DATE	_____ UNIT/PROJECT DIR.	_____ DATE	_____ DEAN/DIRECTOR	_____ DATE	_____ BUDGET REVIEW	_____ DATE	_____ BUDGET OFFICE DATE