

UCSF Human Resources Funding Model Frequently Asked Questions

Why are MSP Clinicians with a concomitant WOS appointment a distinct population category?

Prior to FY18 MSP clinicians with concomitant WOS appointments were treated as Staff in the funding model, which was weighted at 80%. Starting in FY18, the funding model subcommittee recommended this population be weighted at 100% (increase of 20%) to capture the work associated two appointments being managed by HR – the primary staff appointment and the concomitant academic appointment.

How do I update my funding distribution for my HR bill?

HR SRS Billing users can edit their distributions by logging into the HR Service Request System in MyAccess and clicking on the 'Billing' link in the toolbar on the left of the screen. Here you will be able to view the department(s) you have access to, chartstrings for billing, and your roster. You can edit your chartstring information as frequently as you like and add as many distributions as needed by clicking the 'Add Row' button. If someone in your department needs access to the system, please email their names and e-mail address to UCSF-HR-Billing@ucsf.edu

Why does my roster list FTE who are no longer in my organization?

Department rosters reflect the validated headcount snapshot taken the previous December, which provide the FTE count used for the billing calculation for the year.

When will I be billed?

Journals will post at month end or 5-10 business days after the first of the month.

What if my department has unplanned mid-year changes in headcount? Will HR adjust my department's bill?

The HR Funding Model Subcommittee has approved the following procedures for unplanned headcount changes (increases or decreases) after the freeze date and before the start of the upcoming fiscal year (Dec. 1 to June 30) AND unplanned headcount changes during the operating year (July 1 to June 30):

- Department requests for adjustments up to \$10,000 (for headcount decreases) should be addressed with the control point. Conversely, HR will absorb headcount increases up to \$10,000 for the remainder of the fiscal year.
- Unanticipated mid-year changes greater than \$10,000 should be discussed with HR Billing to determine if a billing adjustment is appropriate.
 - o The changes may not be automatic because of the considerable HR work involved during the year of the reduction and because of the potential impact on rates during the following year.
 - o HR Billing will confirm planned changes with HR Shared Services. The department manager and HR Shared Services should agree upon the appropriate amount and timing to adjust the bill. Once a mid-year change is agreed-upon, HR Business Services will process a credit journal outside the billing system for the headcount adjustment.

- HR may also initiate a mid-year adjustment to cover new HR expenses if departmental headcount increases above the \$10,000 threshold.
- HR operating losses associated with adjusted bills due to changes greater than \$10,000 will be absorbed in the following year's billing rates.

What if my department has planned changes to the headcount (increases or decreases) that take effect prior to or upon the upcoming fiscal year and are *known prior to the freeze date*? Will these be accommodated by HR?

Yes, HR accommodates planned changes that are submitted during the headcount review period prior to December 1. In such cases:

- Departments should contact HR Billing at UCSF-HR-Billing@ucsf.edu to share their plans.
- HR Billing may need to verify the timing of the headcount change with HR Shared Services.
- The resulting headcount will be used to calculate the rates, and departments' bills will be calculated based on these rates and the adjusted headcount.

What populations are outside of the billing model? Will you still do the HR work related to those populations?

Residents and Clinical Fellows are not included in the billing model. Please see the next question for details on this population.

The following populations are not included in the billing model, but UCSF HR Shared Services will continue to do the work:

- *Non-ACGME Fellow Clinical Instructor WOS Appointments.* The WOS appointment will be handled and coordinated at the HR Shared Services level. HR Shared Services will coordinate appointments with the department, VPAA office and Advance, and will key appointments into payroll.
- *Staff Volunteer Appointments.* Creation of EID.
- *Affiliate Appointments (NCIRE, VAMC, etc.).* Visa processing and creation of EID as applicable; liaise among department, affiliate, and ISSO.
- *Observers.* Visa processing and consultation as applicable; liaise among department, visitor and ISSO.

Are Residents and Fellows included in the billing model?

No, residents and fellows are not included in the billing model. Departments that have "opted in" for Residents and Fellows transactions will be charged for payroll transaction work only, which is handled by the Shared Services Transactional Services Unit (TSU). This is a separate recharge from the HR billing model and is confirmed annually during the Spring, prior to the start of the fiscal year.

My department is an Organizational Research Unit. How will we be charged?

Organizational Research Units' headcount data is currently incomplete. ORU faculty's home DeptIDs are in academic departments, and faculty's alternate DeptIDs are not always the corresponding ORU

DeptIDs. We will work with the ORUs to identify the accurate list of faculty and code the correct alternate DeptIDs into OLPPS. We will use the ORU DeptIDs as the DeptID of the faculty for billing purposes.

Why is a non-career employee being charged the same amount as a career employee?

The billing model is based on headcount, not FTE/appointment type. The HR effort for a non-career employee is the same as a career employee in terms of the employee life cycle: hire (recruitment, onboarding), maintain (benefits, funding changes, labor issues) and separate (off-boarding).

My department has a WOS faculty member that is paid in another department. Who will be charged for the paid faculty appointment?

The department of the faculty member's home DeptID will be charged. If another department should be charged the paid faculty price, there are two options: change the home DeptID if appropriate or make arrangements with the other department to transfer funds.

My department is a Zuckerberg San Francisco General department. How will the city affiliation agreement work under the billing model?

ZSFG departments will be charged just like any other department. However, ZSFG departments may be reimbursed by the ZSFG Dean's Office or the campus academic department for the affiliation agreement portion as agreed upon between the ZSFG department and the ZSFG Dean's Office or campus academic department. UCSF HR will direct charge HR payroll to the ZSFG Dean's Office and credit back the same amount. The ZSFG Dean's Office will reimburse the individual departments based on the agreements.

My department has state contracts that include budget lines with direct HR personnel payroll. How can I recoup the cost from the state contract?

UCSF HR and the Deans' Offices have worked together to develop a solution similar to the ZSFG city affiliation agreement. Please contact HR Billing at UCSF-HRBilling@ucsf.edu if your department faces this situation. Payroll distribution of appropriate HR personnel will be changed to debit the state contract chartstring. Departments will need to provide details of the state contract. A financial credit journal will be processed on a monthly basis based on the total amount agreed upon divided by 12. The amount billed by HR will not be affected by these two transactions, and departments will still need to provide chartstrings to HR Billing for the full amount owed.

My Department has Research Volunteer Faculty. Shouldn't they be treated the same as the Volunteer Clinical Faculty (VCF)?

Research Volunteer Faculty will be treated the same as Volunteer Clinical Faculty. Previously they were counted as WOS Other Faculty with the headcount weight of 1.0. Billing for this population is complicated by the fact that title codes for Research Volunteer Faculty (3289, 3279, 3269, 3259) also include non-volunteer research faculty. This relatively small population must be manually identified by departments and reviewed by HR Shared Services. Departments should submit a list of Research Volunteer Faculty to HR Billing to receive a credit from UCSF HR for the difference between the headcount weight of 1.0 and 0.2.

How are primary appointments determined for faculty with multiple appointments?

OLPPS determines which appointment is primary based on highest appointment percentage.

Are temporary workers included in HR Billing?

Yes, temporary employees are counted in the headcount and do require HR support thus they are included in the billing methodology. For those workers from the UCSF TEP program, the TEP program covers this cost.