The Chinese University of Hong Kong
Implementation of Human Resources Management System (HRMS)

2nd User Group Briefing Session

23 June 2015

Prepared by HRMS Project Group
Agenda

1. Actions Taken since the Last Briefing Session
2. ESS/MSS/Dept Admin
   a) Profile and eAlert
   b) Maintain Supervisor ID
   c) eLeave
3. Q&A (Part I)
4. Performance Review Process
5. Action items by Dept Admin
   a) Supervisor ID upload template
   b) Leave template
6. Tasks in the Coming Few Months
7. Q&A (Part II)

Disclaimer: Images are for illustration purposes only
Actions Taken since the Last Briefing Session
# High level Project Schedule

<table>
<thead>
<tr>
<th>CUHK HRMS Implementation</th>
<th>2015</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Jan</td>
<td>Feb</td>
</tr>
<tr>
<td><strong>Project Management</strong></td>
<td></td>
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<tr>
<td><strong>Project Mobilisation</strong></td>
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<tr>
<td><strong>Analyse and Detailed Design</strong></td>
<td></td>
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<tr>
<td>Business Processes Review</td>
<td></td>
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<tr>
<td>Solution Blueprint</td>
<td></td>
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<tr>
<td>Functional Design</td>
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<tr>
<td>Functional Specification</td>
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<tr>
<td><strong>Solution Build</strong></td>
<td></td>
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<tr>
<td>Phase 1 Development</td>
<td></td>
<td></td>
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<tr>
<td>Phase 2 Development</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Testing (SIT, UAT)</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Phase 1 SIT</td>
<td>P1</td>
<td>P2</td>
</tr>
<tr>
<td>Load Test</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Phase 1 UAT</td>
<td>P1</td>
<td>P2</td>
</tr>
<tr>
<td>Phase 2 UAT</td>
<td>P1</td>
<td>P2</td>
</tr>
<tr>
<td>Phase 1 Mock Conversion</td>
<td>P1</td>
<td>P2</td>
</tr>
<tr>
<td>Phase 1 Mock Conversion</td>
<td>P1</td>
<td>P2</td>
</tr>
<tr>
<td><strong>3T and End User Training,</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>P1 3T</td>
<td></td>
<td></td>
</tr>
<tr>
<td>P1 EUT</td>
<td></td>
<td></td>
</tr>
<tr>
<td>P2 3T</td>
<td></td>
<td></td>
</tr>
<tr>
<td>P2 EUT</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Production Cutover and Support</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>P1 Cutover</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Go Live</td>
<td></td>
<td></td>
</tr>
<tr>
<td>P2 Cutover</td>
<td></td>
<td></td>
</tr>
<tr>
<td>P1 PIS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>P2 PIS</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Remark:**
- SIT = System Integration Test
- UAT = User Acceptance Test
- 3T = Train-the-Trainer Training
- EUT = End User Training
- PIS = Post Implementation Support
A Website You Would Like To Visit...Later

Human Resources Management System

Background, Objectives and Scope

Human Resources Management System (HRMS) enables enterprise people management processes, including core HR data management, payroll, talent management, workforce management, HR service delivery and workforce analytics.

- From Gartner -

Get Involved & Informed

- May 2015 - HRMS 1st Newsletter
- Mar 2015 - HRMS User Group Briefing Session (PPT: Photos)
- Dec 2014 - HRMS Kick-off meeting (PPT: Photos)
- Jul 2014 - Survey on HRMS (Survey results)
- Jul 2014 - Open Forum for HRMS (PPT)

Who will Benefit

- The University
- Department / Unit Head
- Department / Unit Administrator
- General Staff

Contact us

- Your support is crucial to the success of the HRMS project.

Progress Update

2015

- May - Launching of 1st Newsletter and Project
And…

Coming soon
Please call me... CUPIS!
Profile & eAlert
Employees of CUHK will have access to Self Service functions in the HRMS, including:

- View personal information and current job information
- View/Submit leave requests
- View own benefit summary
- View payslips and tax forms
- Maintain salary bank account information
- View performance ratings
- (For Terms A) Submit ePerformance Review
- View/Enroll training courses (in Phase 2)
Supervisor is a direct reporting officer of a staff. Supervisor-sub-ordinate relationship must be recorded in the HRMS for the following functions:

- Leave approval (1st level approver)
- View team leave calendar
- Appraiser in Performance Review
- Raise delegation request (e.g. leave approval)
Dept Admin is the staff responsible for the administration of a particular dept, with functions including
- Raise staff requisition requests
- Submit staff cost planning
- Submit hourly rate for part-time staff and overtime hours for payroll calculation
- Change supervisors of dept staff
- View job and personal information of dept staff
- Visa renewal

Note: ‘Lead Admin’ will be responsible to assign dept admin and their responsible duties
Dept Admin will be alerted of necessary follow-up actions through:

- Worklist (e.g. employee without Supervisor ID)
- Email (e.g. visa renewal)
- Query View
Available Self Services

Self Service

- Workforce Administration
- Global Payroll
- Absence Management
- Base Benefit
- Performance Review
- Training
Employee Self-Service
Workforce Admin - Personal and Job Information

Purpose:
To allow staff to view their own personal information, and update the content via PO if any of the information is inaccurate

Information includes:
- Residential and Corresponding Address
- Phone Numbers
- Emergency Contacts
- Marital Status
- Visa Information (if any)
- Demographic Information
Workforce Admin - Personal and Job Information

Purpose:
To allow staff to view their own personal information, and update the content via PO if any of the information is inaccurate.

Information includes:
- Residential and Corresponding Address
- Phone Numbers
- Emergency Contacts
- Marital Status
- Visa Information (if any)
- Demographic Information
Workforce Admin - Current job and Salary Information

**Purpose:**
To allow staff to view their own current job and salary information

**Information includes:**
- All current job appointment, and its basic salary/honorarium
- Appt Nature/Reporting Department/Job Title/ Appt Start and End Date / Time Basis
- Supervisor (for Primary Job only)
Global Payroll - Payslip

View Payslips
Orange KTest002

Select Payslip

<table>
<thead>
<tr>
<th>Payment Date</th>
<th>Pay Period</th>
<th>Net Pay</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>31/3/2015</td>
<td>Mar-2015</td>
<td>15,000.00</td>
<td>Monthly Regular Cal Grp</td>
</tr>
<tr>
<td>31/3/2015</td>
<td>Mar-2015</td>
<td>8,325.00</td>
<td>Gratuity Ad Hoc Cal Grp 03</td>
</tr>
<tr>
<td>29/2/2015</td>
<td>Feb-2015</td>
<td>13,500.00</td>
<td>Monthly Regular Cal Grp</td>
</tr>
<tr>
<td>31/1/2015</td>
<td>Jan-2015</td>
<td>13,000.00</td>
<td>Monthly Regular Cal Grp</td>
</tr>
</tbody>
</table>

Purpose:
To allow staff to retrieve/download the Payslip online for record

Information includes:
- All the salary related information (including MPF contribution)
## Benefit Summary

**Purpose:**
To allow staff to view their own benefit summary

**Information includes:**
- Education
- Passage
- Housing
- Medical
- Leave scheme

### Benefit Summary

**Bob Leung**

**As of 01/01/2015**

<table>
<thead>
<tr>
<th>Type of Eligible Benefit</th>
<th>Plan Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medical</td>
<td>UHS E/out SOUT DENTL Hcare2 MAT</td>
</tr>
<tr>
<td>MPF</td>
<td>MPFS + Adj CG (total 15%)</td>
</tr>
</tbody>
</table>

### Education
- Passage
- Housing
- Medical
- Leave scheme

### Covered Dependents

<table>
<thead>
<tr>
<th>Name</th>
<th>Health Benefit Items</th>
<th>Relationship</th>
<th>Medical Top Up Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mary Leung</td>
<td>UHS E/out SOUT DENTL Hcare2 MAT</td>
<td>Spouse</td>
<td>X</td>
</tr>
<tr>
<td>Jack Leung</td>
<td>UHS E/out SOUT DENTL Hcare2</td>
<td>Child</td>
<td>X</td>
</tr>
<tr>
<td>Ben Leung</td>
<td>UHS E/out SOUT DENTL Hcare2</td>
<td>Child</td>
<td>X</td>
</tr>
</tbody>
</table>

### Benefit Provisions

<table>
<thead>
<tr>
<th>Provision</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>UHS</td>
<td>General/Outpatient Care</td>
</tr>
<tr>
<td>E/out</td>
<td>Extra Outpatient Care</td>
</tr>
<tr>
<td>S/out</td>
<td>Specialist Outpatient Care</td>
</tr>
<tr>
<td>DENTL</td>
<td>General Dental and Periodontal Care</td>
</tr>
<tr>
<td>Hcare2</td>
<td>Hospital Care (2nd/3rd Group II)</td>
</tr>
<tr>
<td>Maternity</td>
<td>Maternity Benefit</td>
</tr>
</tbody>
</table>

[Return to Employee Benefit Summary]
Manager Self-Service
### Supervisors - Viewing of Job Information of Subordinates

**Target User:** Supervisors

**Purpose:** To allow supervisors to view the job information of their subordinates and 1 level down (i.e. subordinates to the subordinates)

Visa information is to keep supervisors aware of the visa status of their subordinates

**Information includes:**
- Current job information
- Visa information
- Training Information (in Phase 2)
- Qualification (in Phase 2)
Target User: Dept Heads & Admins

Purpose: To allow department heads and admins to view information of dept staff list in report

Reports can be generated at real-time, and available in excel-compatible format. This facilitates Dept Heads/Admins to have a better understanding of the dept information and perform necessary analyses.
**College Admins - A full list of staff members who are affiliated to their colleges**

**Target User:** College Admins

**Purpose:** To allow college admins to generate a list of staff members affiliated to the college.

<table>
<thead>
<tr>
<th>Empl ID</th>
<th>Pref Title &amp; Name (Eng)</th>
<th>Pref Title &amp; Name (Chi)</th>
<th>Last Name</th>
<th>First Name</th>
<th>HR Status</th>
<th>Department Long Description</th>
<th>Department Code</th>
<th>Job Title</th>
<th>Date Join U</th>
<th>Last Rejoin U</th>
<th>Appointment Begin Date</th>
<th>Appointment End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>123456</td>
<td>Dr Peter Tai Man CHAN</td>
<td>陈大文医生</td>
<td>CHAN</td>
<td>Tai Man</td>
<td>Active</td>
<td>Department of Medicine</td>
<td>MED</td>
<td>Professor of Medicine</td>
<td>01/09/1990</td>
<td>01/09/2010</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>654</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Active</td>
<td>Chung Chi College</td>
<td>CC</td>
<td>College Development Officer</td>
<td>15/07/2010</td>
<td>26/10/2014</td>
<td>26/10/2014</td>
<td>25/10/2017</td>
</tr>
<tr>
<td></td>
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<td></td>
</tr>
<tr>
<td>236</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Active</td>
<td>Student Hostels, CCC</td>
<td>CCSH</td>
<td>Assistant Hostel Manager</td>
<td>02/01/2015</td>
<td>02/01/2015</td>
<td>01/06/2015</td>
<td></td>
</tr>
</tbody>
</table>

**No. of Records:** XX
Update of Supervisor
PO/Dept Admin will be alerted to change Supervisor ID when:
- An supervisor becomes inactive (e.g. resignation)
- Employees without Supervisor (Primary Job)

Notes:
1. **Department**: The dept will be set to the dept of the Admin by default according to security control setting. In other words, the user can only select the department which they have security.

   Only one department can be select each time.

2. **As of Date**: To search the employee job data record as of this specific date.

   This date will be default as the New Effective Date which used to insert into job data

   It is necessary to search again if user would like to change the New Effective Date
Change of Supervisor

Usage of Staff ID No.

1. **Empl ID**: Specify the employee who will be assigned as the new supervisor

2. **Current Supervisor ID**: To search the employee who is under a specific supervisor currently (job data record as of the ‘as of date’)

3. – 5. Specific the new supervisor id(3), update(4) the Employee List and (5) confirm the updating
eLeave Application and Approval
Absence Request (ESS) for Long Leave, Short Leave, Annual Leave, Academic Leave, Sick Leave and Training Leave (Non-Teaching)

**Notes**

1. **Start / End Date**: Specify the start / end date of the leave period

2. **Absence Name**: Specify the leave type (e.g. Annual Leave or Training Leave)

3. **Forecast Balance**: Forecast the leave balance when the leave application is approved.
Approve Absence Request (MSS) for Long Leave, Short Leave, Annual Leave, Academic Leave, Sick Leave, and Training Leave (Non-Teaching)

Notes
1. **Status**: will be changed according to approval/reject
2. **Approve / Deny / Push Back**: Approve, reject or require requester to revise the application
Employees can view their own absence request history

Notes
1. Specify the enquiry period
2. Click to view specific leave record
The approval process of the selected approval transaction as follows.
The Team Calendar Function is for:

- The supervisors to view their subordinates’ leave records. The supervisors can make use of the information to approve or deny the new coming leave approval request.
- The department administrators, departmental heads and assigned persons to view their departmental staff’s leave records to have the better understanding on the staff’s presence and absence.

The team calendar function allows to enter selection criteria to filter the leave status of the desired staff in daily calendar format.

**Notes**

1. Specify the enquiry period
2. Click to view more selection criteria, e.g. Job Code, Job Function
Questions & Answers (Part I)
ePerformance Review
Flow of Performance Review (Non-Teaching ToS A/B/C)
Flow of Performance Review (Non-Teaching Terms A)

Performance Review and Development System (PRDS) (For Non-Teaching Staff (Terms A))

1st / early 2nd week of July

2nd / 3rd week of July

Performance Review Cycle

Late Sep / Early-Oct

Start

Generates Population for Performance Review

Batch Create Performance Review Document

Check if Quota Freezed for PLRS

Generate Result for Moderation

Mention

Moderation

Recall Document

NO

Correct Rating?

YES

Review Performance Review Result

Approve Result?

NO

NO

Transfer Document

Perform Evaluation

Transfer Document

Adjust Rating and Comment (Optional)

Conduct Review Meeting

Specify or Update Rating Adjustment Required

Share Result with Employee(s)

Request Acknowledgement

Submit for Approval

Comment and Acknowledge

End

NO

NO

YES

Perform PLRS

End

Employee

Supervisor / Reviewer

D U Head

PO

© 2015 IBM Corporation
Flow of Performance Review
(Non-Teaching Terms B/C)

Performance Review and Development System (PRDS) (For Non-Teaching Staff (Terms B & C))

<table>
<thead>
<tr>
<th>1st / early 2nd week of July</th>
<th>Mid July – Mid October</th>
</tr>
</thead>
<tbody>
<tr>
<td>PO</td>
<td></td>
</tr>
<tr>
<td>Start</td>
<td>*Quota Freezed for PLRS</td>
</tr>
<tr>
<td>Generate Population for Performance Review</td>
<td>Batch Create Performance Review Document</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>Supervisor / Reviewer</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>Department Administrator</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>Department/Unit Head</td>
<td></td>
</tr>
</tbody>
</table>

Start:
- Input Performance Rating
- Submit Performance Rating
- Generate Result for Moderation

*Quota Freezed for PLRS

Batch Create Performance Review Document

Perform Performance Review Outside PeopleSoft

Request for Update to PO

Adjustment Required?

Yes

Submit Finalized Performance Rating

Perform PLRS

No

Yes

Moderation Required?

No

Generate Result for Moderation

Submit Performance Rating

Start
Detailed Business Flows for Performance Review
PO user will create a report of population generation to retrieve a list of employees who are due for performance review (Non-Teaching) for a defined period.
PO user will create Performance Review document by batch for recording performance rating and comment for Terms A Non-Teaching staff.

PO user will create Performance Review document by batch for recording performance review final result for Terms B&C Non-Teaching staff.
Terms of Service A Staff
Performance Review (Non-Teaching Terms A) – Notification of Performance Review

After creating Performance Review Document, supervisor will receive email notification for every Performance Document created under their subordinates.

This automatic notification is to alert you that the HR Department has created CU Performance Review (NT) performance documents for your team for the period beginning 07/01/2015 and ending 06/30/2016. For each employee, we have created both your manager’s document as well as the employee’s self-evaluation.

You may select this link to access the documents for your team:

CU Performance Review (NT) documents were successfully created for the following employees:
Laura Jones (KOM005)

(Please do not respond to this automatic notification.)
Performance Review (Non-Teaching Terms A) – Evaluation Forms

Similar to the existing Review Report, there will 2 sections to input the evaluation result of an employee.

Reviewer can also upload supporting document for this review.
Performance Review (Non-Teaching Terms A) – Perform Evaluation (Accountability)

Supervisor will input weight and rating to employees for each item in Accountability section on the Performance Review document. He/ She can also input comment for each item.

<table>
<thead>
<tr>
<th>Title and Description of Accountability Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supervisor will input weight and rating to employees for each item in Accountability section on the Performance Review document. He/ She can also input comment for each item.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Rating Scale</th>
<th>Now</th>
<th>Future</th>
</tr>
</thead>
<tbody>
<tr>
<td>Excellent</td>
<td>&gt;5.5-6.0</td>
<td>&gt;55-60</td>
</tr>
<tr>
<td>Very Good</td>
<td>&gt;4.5-5.5</td>
<td>&gt;45-55</td>
</tr>
<tr>
<td>Good</td>
<td>&gt;3.0-4.5</td>
<td>&gt;30-45</td>
</tr>
<tr>
<td>Fair</td>
<td>&gt;1.5-3.0</td>
<td>&gt;15-30</td>
</tr>
<tr>
<td>Poor</td>
<td>0-1.5</td>
<td>0-15</td>
</tr>
</tbody>
</table>
Performance Review (Non-Teaching Terms A) – Perform Evaluation (Accountability) (Cont’)

Supervisor can add items to Accountability Section and give rating.

Upon clicking the *Calculate All Rating* button, the overall rating can be calculated based on the weight and rate of Accountability Items.
Performance Review (Non-Teaching Terms A) – Perform Evaluation (Competencies)

Supervisor can give comment to each of the pre-defined items on Competencies section.

Supervisor can give final comment to the Competencies section.
Each supervisor can export Performance Review result in RTF format (Editable by MS Word) from HRMS and carry out Review Meeting with each of their subordinates. After that, the supervisor will share the result with employee in HRMS, so that they can view the result in ESS.
After that, employee should acknowledge the Performance Review document.

Employee can input comment on Performance Review document.
Department Head will receive notification on approval request for Performance Review document on Worklist.

Department Head then approves the Performance Review document.
Terms of Service B/C Staff
Performance Review (Non-Teaching Terms B & C) – Perform Evaluation Outside PeopleSoft

- The Performance Review process and approval for Non-Teaching Terms B & C staff will be carried out outside PeopleSoft.

- Department Administrator will obtain the final result from the Department Head and prepare to input the result back to PeopleSoft.
Department Administrator will input Performance Review overall rating, and indicate “Any Rated Poor?” for Terms B&C staff on the *Input Performance Rating* page.

### Input Performance Rating

<table>
<thead>
<tr>
<th>Employee ID</th>
<th>Emp Record</th>
<th>Name</th>
<th>Job Code Description</th>
<th>Overall Rating</th>
<th>Confirm Overall Rating</th>
<th>Any Rated Poor?</th>
<th>Remarks</th>
<th>Appointment Mode</th>
<th>Terms of Service</th>
<th>Under PLRS</th>
<th>Subject to Quota</th>
<th>Contract Begin Date</th>
<th>Contract End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>123456</td>
<td>0</td>
<td>Chan Tai Man</td>
<td>Executive Officer 1</td>
<td></td>
<td></td>
<td></td>
<td>R</td>
<td>B</td>
<td>Y</td>
<td>Y</td>
<td></td>
<td>01/01/2013</td>
<td>31/12/2015</td>
</tr>
<tr>
<td>234567</td>
<td>0</td>
<td>Chan Yiu Man</td>
<td>Executive Officer 2</td>
<td></td>
<td></td>
<td></td>
<td>C</td>
<td>B</td>
<td>Y</td>
<td>Y</td>
<td></td>
<td>01/01/2013</td>
<td>31/12/2015</td>
</tr>
<tr>
<td>345678</td>
<td>0</td>
<td>Chan Chung Man</td>
<td>Executive Officer 2</td>
<td></td>
<td></td>
<td></td>
<td>C</td>
<td>B</td>
<td>Y</td>
<td>Y</td>
<td></td>
<td>01/01/2013</td>
<td>31/12/2015</td>
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<tr>
<td>456789</td>
<td>0</td>
<td>Chan Siu Man</td>
<td>Executive Assistant 2</td>
<td></td>
<td></td>
<td></td>
<td>C</td>
<td>C</td>
<td>Y</td>
<td>Y</td>
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<td>01/01/2013</td>
<td>31/12/2015</td>
</tr>
<tr>
<td>567890</td>
<td>0</td>
<td>Chan Man Man</td>
<td>Executive Assistant 1</td>
<td></td>
<td></td>
<td></td>
<td>C</td>
<td>C</td>
<td>Y</td>
<td>Y</td>
<td></td>
<td>01/01/2013</td>
<td>31/12/2015</td>
</tr>
</tbody>
</table>

Last Update By: ktc  Last Update Date: 27/04/2015
Department Administrator will submit Performance Review result based on the *Input Performance Rating* page for Terms B&C staff on the *Submit Performance Rating* page. The result will be saved in the corresponding Performance Review document for each employee.
Department Head will create a report of performance review result to carry out moderation among the performance of staff in his own department for a defined period.
Performance Review (Non-Teaching Terms B & C) – Submit Finalized Performance Review Result (Cont’)

Business Purpose: Department Administrator will submit the finalized Performance Review result based on the *Input Performance Rating* page for Terms B&C staff on the *Submit Performance Rating* page by clicking the “Finalize?” button. The result will be saved and the Performance Document for each employee will be marked as completed.
Performance Review (Non-Teaching Terms B & C) – View Completed Performance Document by Employee

CU Performance Review (NT)
Manager Evaluation
Will Smitherson

<table>
<thead>
<tr>
<th>Actions</th>
</tr>
</thead>
</table>

Enter ratings and comments for each section in this evaluation, if applicable. At any point in time you can save this evaluation by selecting the Save button.

Result of Any Rated Poor and Overall Performance Rating in the Input page will be captured in the Performance Document for Employee / Supervisor to review.
Upon completion of inputting Performance Review Result, a process will be triggered to calculate MI Allocation and Bonus for every Department.
PLRS – MI and Bonus Amount Assignment Page

**Total Quota for 1 MI of each Terms and Total Bonus Amount.**

### Department Administrator/Head allocates Bonus for every Terms. A separate section will be displayed for each Terms and Appointment Mode. (Regular/Contract)

**Save**: Temporarily save the result, which can be edited later.

**Submit**: Submit the finalized result, only finalized result will be used for actual MI and Bonus allocation. The result will be frozen once it is submitted.

---

### Regular Terms A

<table>
<thead>
<tr>
<th>Employee ID</th>
<th>Empl. No.</th>
<th>Name</th>
<th>Job Code Description</th>
<th>Grade Rate</th>
<th>Salary</th>
<th>Monthly Salary ($)</th>
<th>No. of Points Scoring Top Point</th>
<th>Under PLRS</th>
<th>Subject to Quota</th>
<th>Appt Start Date</th>
<th>Appt End Date</th>
<th>Recommended Bonus ($)</th>
<th>Cost Centers</th>
<th>Project (WBE)</th>
<th>Interest Order</th>
<th>Percentage</th>
<th>Bonus to be charged for the Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>400001</td>
<td></td>
<td>CHAN Ka Ming</td>
<td>Assistant Secretary I</td>
<td>N</td>
<td>1</td>
<td>50,000</td>
<td>100</td>
<td>Y</td>
<td>N</td>
<td>01/04/2015</td>
<td>01/06/2015</td>
<td>20,000</td>
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<td>500</td>
</tr>
<tr>
<td>400002</td>
<td></td>
<td>LEUNG Siu Ping</td>
<td>Assistant Secretary I</td>
<td>N</td>
<td>1</td>
<td>50,000</td>
<td>100</td>
<td>Y</td>
<td>N</td>
<td>01/04/2015</td>
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<td>20,000</td>
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### Contract Terms B

<table>
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<th>Employee ID</th>
<th>Empl. No.</th>
<th>Name</th>
<th>Job Code Description</th>
<th>Grade Rate</th>
<th>Salary</th>
<th>Monthly Salary ($)</th>
<th>No. of Points Scoring Top Point</th>
<th>Under PLRS</th>
<th>Subject to Quota</th>
<th>Appt Start Date</th>
<th>Appt End Date</th>
<th>Recommended Bonus ($)</th>
<th>Cost Centers</th>
<th>Project (WBE)</th>
<th>Interest Order</th>
<th>Percentage</th>
<th>Bonus to be charged for the Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>600001</td>
<td></td>
<td>CHAN Tai Man</td>
<td>Project Coordinator I</td>
<td>N</td>
<td>1</td>
<td>50,000</td>
<td>100</td>
<td>Y</td>
<td>Y</td>
<td>01/04/2015</td>
<td>01/06/2015</td>
<td>6,000</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>600</td>
</tr>
<tr>
<td>600002</td>
<td></td>
<td>YAN Ka-Ka</td>
<td>Executive Officer I</td>
<td>N</td>
<td>1</td>
<td>50,000</td>
<td>100</td>
<td>Y</td>
<td>Y</td>
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<tr>
<td>600003</td>
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<td>LAM Siu Ze</td>
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<td>01/04/2015</td>
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### Contract Terms C

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<th>Empl. No.</th>
<th>Name</th>
<th>Job Code Description</th>
<th>Grade Rate</th>
<th>Salary</th>
<th>Monthly Salary ($)</th>
<th>No. of Points Scoring Top Point</th>
<th>Under PLRS</th>
<th>Subject to Quota</th>
<th>Appt Start Date</th>
<th>Appt End Date</th>
<th>Recommended Bonus ($)</th>
<th>Cost Centers</th>
<th>Project (WBE)</th>
<th>Interest Order</th>
<th>Percentage</th>
<th>Bonus to be charged for the Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>600004</td>
<td></td>
<td>WONG Shiu-Ming</td>
<td>Executive Officer I</td>
<td>N</td>
<td>1</td>
<td>50,000</td>
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<td>Y</td>
<td>Y</td>
<td>01/04/2015</td>
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<tr>
<td>600005</td>
<td></td>
<td>CHENG Wai-Wai</td>
<td>Executive Officer I</td>
<td>N</td>
<td>1</td>
<td>50,000</td>
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<td>Y</td>
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<td>01/04/2015</td>
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<td>6,000</td>
<td></td>
<td></td>
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<td></td>
<td>600</td>
</tr>
</tbody>
</table>

**MI can only be edited if there are 2 staff members with the same rating and compete for a remaining quota.**

Bonus can be edited for all staff members who are eligible for Bonus.
Action Items by Dept Admins
Collection of Supervisor IDs

**Template to Departments in early July**
- **Scope:** Active staff members with primary job attached to your unit
- **Collection periods:**
  - 1\textsuperscript{st} round – July 2015
  - 2\textsuperscript{nd} round – March 2016 (before launch)

<table>
<thead>
<tr>
<th>Employee ID (will be provided in the Template)</th>
<th>Employee Name (will be provided in the Template)</th>
<th>Employee Dept (will be provided in the Template)</th>
<th>Supervisor ID (To be filled in by Department)</th>
</tr>
</thead>
<tbody>
<tr>
<td>A1234B</td>
<td>CHAN Tai Man</td>
<td>ITSC</td>
<td>B2345C</td>
</tr>
<tr>
<td>123456</td>
<td>WONG Siu Man</td>
<td>PER</td>
<td>102913</td>
</tr>
</tbody>
</table>
Collection of Leave Balance

- **Purpose**
  - To collect leave balances of accounts previously maintained manually for system set-up

- **Scope**
  - Pre-1998 Annual Leave Scheme for Terms (B)/(C)

Template example:

<table>
<thead>
<tr>
<th>Staff ID</th>
<th>Name</th>
<th>Cut-off Date*</th>
<th>Balance</th>
<th>Signautre</th>
</tr>
</thead>
<tbody>
<tr>
<td>123456</td>
<td>Chan Tai Man</td>
<td>23 days</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

* Cut-off Date: to be determined (~ 1 month before system go-live)*
Collection of Leave Balance

- **Scope**
  - Part-time appointees meeting 4-18 criteria (e.g. under continuous contract as defined in the Employment Ordinance)

- No cut-off balance will be collected

- Accumulated statutory annual leave entitlement should be granted before system go-live (using the existing “Request for Payment of Statutory Benefits to P/T Hourly-rate Staff” form available at PSU’s website)
Tasks in the Coming Few Months
## Tasks in the Coming Few Months

<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Confirmation of Functional Design</td>
<td>By 10 July</td>
</tr>
<tr>
<td>Data Conversion and Data Reconciliation in 2 batches by ITSC and PO:</td>
<td></td>
</tr>
<tr>
<td>- Mock 1 [for System Integration Test (SIT)]</td>
<td>End June – Mid-August</td>
</tr>
<tr>
<td>- Mock 2 [for User Acceptance Test (UAT)]</td>
<td>Early October – Early November</td>
</tr>
<tr>
<td>Development by IBM</td>
<td>May – November</td>
</tr>
<tr>
<td>SIT by ITSC</td>
<td>Mid-July – End October</td>
</tr>
<tr>
<td>UAT by BUR/PO/ITSC</td>
<td>End November – End January 2016</td>
</tr>
<tr>
<td>Early User Engagement in UAT</td>
<td>Early January 2016</td>
</tr>
<tr>
<td>End User Training/Trial Run</td>
<td>End January – End February 2016</td>
</tr>
</tbody>
</table>
Questions & Answers (Part II)
The End

Thank You!