## Circular Letter No. OP-17-01

[seal: University of Puerto Rico 1903] VICE PRESIDENT OF RESEARCH AND INNOVATION, DEANS FOR ADMINISTRATION, BUDGET DIRECTORS, FINANCE DIRECTORS, EXTERNAL FUNDS FISCAL ADMINISTRATION OFFICES, ADMINISTRATORS, AND ADMINISTRATIVE PERSONNEL OF EXTERNAL FUND PROJECTS

[Budget Office]

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Basilio RiveraArroyo
Director

ORACLE HRMS SYSTEM – 1) INSTRUCTIONS FOR USING UFIS ACCOUNTS SEGMENTS: FUNDS, FUNCTION, PROJECT, AND FISCAL YEAR WHEN ENTERING "IN KIND" TASKS; 2) INSTRUCTIONS FOR ENTERING THE INSTITUTIONAL RESEARCH TASK IN REGULAR BUDGET FUND XX110

## 1) "In kind" Task:

The new Human Resources System (ORACLE MRMS), through the Labor Distribution Module, is capable of "distributing" the salary of an employee based on the tasks he performs. When entering transactions of "in kind" contributions, the segments *Fund, Function, Project, and Fiscal Year* shall be used in the structure of the account assigned in order to identify this type of expenditure, through the "Schedule" process in the affected position. This capacity will allow to identify, in the time and effort report, the "in kind" task (research, training, etc.) performed by the faculty personnel participating in a project funded by external funds.

For example, a professor from the Department of Biology who has a five-percent task approved to work "in kind" in a research project, his salary would be divided in HRMS through the "Schedule" process, as follows:

XX110.001.000.5021.110.00000000000015
XX120.001.000.5021.220.301590160101.00
XX231.001.000.5021.220.202020040011.00
XX231.001.000.5021.220.331590390101.00

25% ("schedule") (federal fund)
XX231.001.000.5021.220.331590390101.00

[Jardín Botánico Sur: 1187 Calle Flamboyan San Juan, Puerto Rico 00926-1117

787 250-0000 Ext. 6001 Fax: (787)758-1206]

Total 100%

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HRMS System's Report entitled *Employee Effort Certification Form* will show the result of these transactions as follows:

		Employee Effort Certification Form For The Period 16-APR-2015 - 16-APR-2015				Page Date	43 15-JAH-25	43 15-JAN-2016	
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Observe, in this hypothetical example that transaction XX120.001.000.5021.220.301590160101.00 corresponds to five-Percent of the "In kind" contribution. In order to enter the same in the HRMS System it is established that the rule for assigning the account is: 1) institutional fund XX120 will be used; 2) function 220 will be used to identify the expense; 3) the number of the external project to which the "in kind" contribution of the employee is adjudicated will be added; 4) fiscal year "00" will be indicated to the account. Other segments will remain the same as those of the "default account."

This rule will allow external fund project administrators to accurately show in the documents sent to the Office of Human Resources, an updated distribution of the teaching task in the time and effort reports, this is a top priority for the institution in meeting the requirements set forth in federal regulations and external agencies.

As part of the implementation of the HRMS system, the units' Budget Offices will receive the "in kind" task transaction data, as well as the research task distribution, in the official form (T002 or its equivalent) generated through the Human Resources Offices and shall proceed to enter and to update in the system ("schedule" transaction) the distribution of accounts and 'in kind' tasks to the appropriate position. Also, this process will require Budget Offices to make a fund adjustment between funds XX110 and XX120. The same shall be sent to the Accounting Offices to be recorded in ORACLE's GL – UFIS.

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These instructions applicable "in kind" tasks repeal those included in Circular Letter OP-16-01 issued on February 25, 2016.

## 2) Institutional Research Tasks:

When approving institutional research tasks to professors to conduct institutional research—with regular budget funds, fund XX110—a "schedule" transaction will be entered in the HRMS using the same account XX110 from which the professor's salary is paid and changing the task function to <u>220-individual research</u>. An example of this type of transaction is shown below:

## Regular budget:

XX110.021.000.5021.110.000000000000017	9 credit hours 75%	\$46,953
XX120.021.000.5021. <b>220</b> .000000000000017	3 credit hours 25%	\$15,651
Total	100%	\$62,604

Budget Offices will receive the "schedule" transaction through the official form (T002 or its equivalent) issued by the Office of Human Resources in each unit. It is important that the academic departments or the directors of research institutional projects (with regular budget funds) timely report to the Office of Human Resources the changes and distributions of the faculty personnel tasks.

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