HR Monthly Review Report

UCSF Controller's Office

The **HR Monthly Review Report** combines several report subgroups into a single review report with the ability to display the following data: New Hires, Separations, Appointments near end, Distributions near end, Probation period near end, Work permit end date, Limited employee hours, and Distributions greater than 100%.

What Can I Learn From the HR Monthly Review Report?

- Supports users who manage employee appointments by providing the ability to review and monitor specific HR activities and statuses every month
- Provides the ability to run for *all* subgroups or for *specific* activity types

Filtering the Employee HR Monthly Review Report

Filters are divided into four sections:

1 Home Department/Date Filters:

  a Filter by **Home Dept ID**

  b The **Date Range** fields are unavailable since this report is always run as of the current date

2 HR Codes Filters (*None of the following are **required** (*) fields*):

- Filter by **Personnel Program**, **Appointment Type**, **Employee**, **Title Code**, **Employee Status**, **Title Unit Code**, **Class Title Outline**, and/or **Appointment Representation Code**

3 Report Specific Filters

- Filter by **Activity Type**, **Supervisor**, **Separation Reason**, and/or **Visa Type**
- **Activity Type** is a *required* (*) field. The default Activity Type is **All**

4 Distribution Chartstring Filters:

- Filter by one or more chartfield: **BU** (Business Unit), **Fund**, **Dept ID**, **Project**, **Function**, **Flexfield**, **Dept ID Site**, **Project Award/Parent**, **Project Manager/PI**, **Project Use**, and/or **Project Lab Owner**
- **Account** and **Activity Period** (**a**) are unavailable because these chartfields are not used in HR distribution data

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Tips & Tricks

- The filter page can be used to enter a single criterion, such as **Home Department** or **Employee**. **Note**: *At least one field with an orange triangle must be selected*
- The report can be narrowed using the many available **HR Code** and **Report Specific** filters
- Running the report for **Home Department** or **Distribution Dept ID** will return all of the *children* Dept IDs in the report.
- This report is *always* run as of the current date
- The selection of **Activity Type** (a) can be made from the filter page or from within the report

From the filter page   *From within the report*

- HR reports do not contain subtotals or totals by Activity Type
- You can display **Code Descriptions only, Codes only,** or **both** using the drop-down menu in the upper left corner of the report view (b)
  - Displaying the **Codes and Code Descriptions** in the report will expand the report width considerably - if you need to print the report, the default view of **Codes Only** is recommended.
- In the report view, each **Activity Type** (c) is grouped separately with a header. (Note that the view with **All** types is a very wide report and can be difficult to analyze. Selecting one or two activity types is recommended.)
  - **Hires** - displays employees with a hire date 45 days prior to the report run date and any future dates
  - **Separations** - displays employees with a separation date 45 days prior to the report run date
  - **Appointment Near End** - displays employees with an appointment end date within 3 months of the report run date
  - **Distribution Near End** - displays employees with a distribution end date within three months of the report run date
  - **Limited Employee Hours** - displays Limited employee hours worked in the last **12 months.** Hours ≥ 700 hours are displayed in red font.
  - **Distribution > 100%** - displays employees with a sum of all distributions greater than 100%
  - **Work Permit End Date** - displays employees with a work permit end date field from PPS. End dates within 3 months are displayed in red font
  - **Probation Period End Date** - displays employees with a probationary end date 45 days prior to the report run date and any future dates

Additional columns, especially the Code Descriptions, may add considerable width to the report

Each **Activity Type** is grouped separately with a header

More information for **MyReports** users is available on the **Controller's Office website** (http://controller.ucsf.edu/fin_reports/)