

Electronic PDO User Guide

Compiled by the Office of Institutional Research
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Background

The Electronic PDO system (ePDO) is an internally-designed and maintained portal for viewing and approving certain faculty payments. Specifically, the system handles the following payments: (a) all teaching assignments for adjuncts, (b) extra teaching assignments for full-time faculty and PIRs (e.g. internships or one-on-one instruction assignments), and (c) teaching assignments in non-regular terms (e.g. intersession or summer). The system uses the payment criteria outlined in the *Provost's Compensation Guidelines* to calculate compensation based on the data extracted from Banner. As such, the accuracy of ePDO is directly dependent on the accuracy of the data housed in Banner.

The system utilizes an access control system with permissions granted by the Office of Institutional Research (IR). Administrative staff are granted “view” access in order to monitor pending/approved payments. Department chairs (or specially-approved proxies for certain programs) have “chair” access to verify the correct compensation has been calculated in the system and the ability to approve records for payment. The respective Dean’s offices have “dean” access to make final approval of the chairs’ locked records. Once records have been approved at the Dean’s level, the payment information is sent to the Payroll office and the ePDO record is permanently locked.

Accessing ePDO

1. Log in to the *myCharger* portal.
2. Select the “Employee Resources” tab on the left side of the page.
3. On right side of the page, find the “Employee Resources” section and click on the **ePDO System** link. The link will open a new browser window, and may prompt you to re-enter your credentials.
4. Select a Term, Department, and a Report Type (e.g. “Organized Classes and Labs” or “Individualized Instruction”), then click Search. (Fig. 1)

The screenshot shows the University of New Haven Faculty Rate Approval System interface. At the top left is the University of New Haven logo. To the right is the text "University of New Haven" and "Faculty Rate Approval System". Below this is a header "Please select term, department and report type." and a user login status "You are logged in as : JLuoma , View". The main form has three rows: "Term:" with a dropdown menu showing "-- Select Term --", "Department:" with a dropdown menu, and "Report Type:" with a dropdown menu showing "-- Select Report Type --". Red arrows point to each of these three dropdown menus. At the bottom of the form is a "Search" button, which is highlighted with a red rectangular box.

Fig. 1: Generating ePDO reports.

Using ePDO

Use of ePDO will depend on the user’s role as either a “viewer” or an “approver.”

View Access

Someone with “view” access will use ePDO to check whether complete and/or correct data have been populated from Banner, as well as to monitor which sections have been approved or still need to be approved.

The key fields to examine, as highlighted in Fig. 2 below, are:

- (a) **Enr** – the number of students enrolled in the section. This number will update automatically as students register for (or withdraw from) the course.
- (b) **TCH** – the number of teaching credits assigned to the section. This number is set as a default for the course offering in Banner; TCH can be modified by IR at the request of the Dean.
- (c) **Rate** – the regular per-credit rate for the instructor. This rate can be modified by IR at the request of the Dean. Rates set outside the range outlined in the *Compensation Guidelines* will first require the Provost’s approval.
- (d) **Multiplier** – the rate multiplier used for graduate sections, multi-section labs, and combined lecture/labs.
- (e) **Total** – the total calculated compensation for the assignment. **This is the amount that is being approved.**

Offerin	Sec	Instructor	CourseTitle	Credits	Enr	SCH	Status	PaymentType	TCH	Rate	Multiplier	Total
BIOL 4462	01	Nigro Mattos, Mariana	Lab-BIOL 4461	1	14	14	PT	Org Class Lab No Coord	3	1085.00		3255.00
BIOL 4462	02	Mutcherson II, Raye J.	Lab-BIOL 4461	1	12	12	PT	Org Class Lab No Coord	3	1085.00		3255.00
BIOL 4462	03	Nigro Mattos, Mariana	Lab-BIOL 4461	1	13	13	PT	Org Class Lab No Coord	2	1085.00	1.500	3255.00
BIOL 4462	04	Nigro Mattos, Mariana	Lab-BIOL 4461	1	14	14	PT	Org Class Lab No Coord	2	1085.00	1.500	3255.00
BIOL 4493	01	Ghaedi, Mahboobe	Evaluation of Scientific Lit	3	13	39	PT	Organized Class	3	1085.00		3255.00
BIOL 4506	02	Melillo, Anthony	Molecular Genetics/Genomics	3	13	39	PT	Organized Class	0	1206.00		0.00
BIOL 4511	01	Levy, Joan B	Molec Biol of Proteins W/Lab	4	4	16	PT	Org Class Lec/Lab	0	1375.00	1.200	0.00
CMBI 6606	02	Melillo, Anthony	Molecular Genetics/Genomics	3	6	18	PT	Organized Class	3	1206.00	1.334	4826.41

Fig. 2: Fields to monitor in an ePDO report.

If a chair’s username appears next to a record, the record has already been approved by the chair. If a dean’s username appears next to the record, it has already received final approval from the Dean’s office and the record has been sent to Payroll to commence payment. A record becomes locked as soon as a first approval is made.

If a record is highlighted in yellow, the assignment has changed in Banner after the record was approved in one of the following ways: payment type, TCH, or rate (or enrollment if the payment type is “individualized instruction”). In essence, ePDO reflects the record at the time it was approved, and the highlighting is meant to help identify records that have had changes in Banner that may affect compensation.

The bottom of the page lists any course assignments in the respective term/department that do not qualify for payment through ePDO. These sections will include assignments taught by full-time faculty/PIRs during a regular term, and assignments taught by administrative staff or graduate assistants. (Fig. 3)

Instructor details with no compensation:										
Offering	Section	Instructor	CourseTitle	Credits	Enrolled	SCH	FacultyStatus	PaymentType	TCH	
BIOM 6601	01	Amoako, Kagya	Biomedical Engr Seminar	2	7	14	FT	Organized Class	3	
BIOM 6610	01	Xiao, Dequan	Biomedical Polymers	3	6	18	FT	Organized Class	0	
BIOM 6678	01	Umarov, Sabir	ST: Multivariate Calculus	4	0	0	FT	Organized Class	0	
BIOM 6679	01	Flay, Nina	ST: Biological Organization	4	2	8	FT	Organized Class	0	
CHEM 1100	01	Hesser, Tiffany	Chemistry Recitation	0	14	0	FT	Lab	0	

Fig. 3: Assignments that will not be paid through ePDO are displayed at the bottom of the page.

Approval Access

Someone with “chair” or “dean” access will use ePDO to review the calculated compensation for course assignments, as well as to approve those payments.

Distinct from users with “view” access, these “chair/dean” users will see checkboxes to the right of each record. By checking the box, the user is (1) signaling that the compensation amount is correct and (2) locking the record. **Please note that this approval is only registered in the ePDO system once the “Save” button has been clicked.** (Fig. 4)

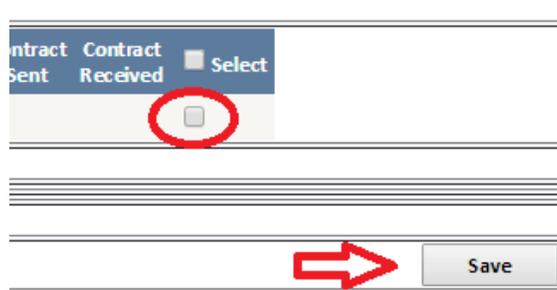


Fig. 4: Checkbox used to signal approval and save button.

After an approval (or group of approvals) is made, the approver's username and a date-stamp will appear next to the record. A chair-level approval is unnecessary for a Dean-level approval to occur. Once Payroll has processed the record, "Banner" and a date-stamp will also appear. (Fig. 5)

Total	Chair	ApproveDt	Dean	ApproveDt	Payroll	ApproveDt
3900.00	PPepin	8-31-2016	MRossi	8-31-2016	Banner	9-12-2016

Fig. 5: Chair and Dean approval indicators and Payroll acceptance indicator.

Frequently asked questions

Q1: At what point during the term should ePDO approvals be done?

A1: Approvals for organized class/lab sections should only occur after the first meeting date of the course, as sections are subject to cancellation or reduced compensation (e.g. for low enrollment, added cross-listings, or TCH adjustments) during the first week of a term. As individualized instruction sections are dependent on enrollment for payment calculations, approvals are not recommended until later in the respective term, but at the very least after the end of the Add/Drop period.

Q2: Can ePDO approvals be removed if a payment amount needs to be changed?

A2: If the "Banner" username and date-stamp do not appear next to the dean's approval, the record has not yet been processed by Payroll and the record can still be unapproved. First the Dean must uncheck the box next to the record and press "Save," then the chair must uncheck the box next to the record and press "Save." However, if the payment has already been processed, the chair/Dean must directly contact the Payroll office and have the payment modified outside of ePDO.

Q3: Can ePDO records be exported?

A3: At this point in time, ePDO records can only be captured by copying and pasting.