PHR REPORTS – TIPS AND HINTS FOR PHR USERS

PHR Reports assist PHR Creators and Approvers in managing and monitoring PHR transactions such as appointments, leave balances and usage, and gross pay. In addition, these reports help departments monitor important deadlines such as Use Or Lose, Post-Doc Reporting, and Faculty Leave Payout Indicator just to name a few. This helpful guide will take the guesswork out of what report to run and when.

FISCAL YEAR REPORTING:

Fiscal year reporting is useful prior to the end of the fiscal year for forecasting departmental budgets. However, these reports are valuable anytime during the year.

- Probationary Status Report
- Funding Sources – Current or Future
- C2 Conversion Report
- Faculty Annual Leave Payout Indicator Review

PAY PERIOD REPORTING:

Pay period reporting is very important to manage numerous processes as timesheet signoff, missing supervisor signatures, and pay adjustment, etc. Most of these reports should be utilized after the close of the pay period.

- Compensatory Time Reports
- Pay Check Distribution
- Pay Adjustments Pending Approval
- Work Group Report (once a month)
- Timesheet Signatures and Approvals
- Terminating Appointments

FALL AND SPRING REPORTING:

Twice a year the data in PHR is reviewed for accuracy. It is part of a campus wide effort to ensure the data in PHR and other reporting systems are accurate. Information Services sends out a memorandum informing the campus it is time to review personal data for accuracy. A notice is also sent to PHR Creators and Approvers to begin running reports to guarantee accuracy.

- Emergency Contact Reports
- Post-Doc Report
- Employee Degree Information

MAINTENANCE REPORTING:

Maintenance reporting is excellent for managing administrative processes. For instance, ensuring staff will not be in jeopardy of losing annual or personal leave, tracking leave balances, or reviewing the 3Ds list for accuracy.

- Use or Lose Leave Report
- Leave Usage Report
- 3D Mailing List
- Leave Balances Report

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