Visas Expiring in 30 days: Responsible Person; Payroll Coordinator
Purpose: to identify employees with visas that are going to expire in 30 days. Employees must be contacted to submit renewal visas.

Find Criteria:

Visa End Date = Last date of the upcoming month.
Status = Active

H1B Visas Expiring in 6 months: Responsible Person; Payroll Coordinator
Purpose: to identify employees with H1B visas that are going to expire in 6 months. Employees must be contacted to submit renewal visas if required.

Find Criteria:

Visa Type: H1B
Visa End Date = 1st of current month through last day of 6th month.
Status = Active

Employees Terminating in the next 30 days: Responsible Person; Payroll Coordinator
Purpose: to identify employees who have a termination date in the upcoming 30-day period. Notify supervisor of pending termination date and verify whether the assignment is actually going to end or should be re-appointed.

Find Criteria:

End Date = Date range covering next 30-day period.
**Employees Terminating in the Current Month: Responsible Person; Payroll Coordinator**  
Purpose: to identify employees who are terminating in the current month and verify that the PAR and Employee Termination Clearance have been processed/initiated.

Find Criteria:
Same as above, except date range is beginning to end of the current month.

**Employees Hired within last 3 months or last 6 months: Responsible Person; Payroll Coordinator**  
Purpose: to identify benefits-eligible employees who were hired in the last 3 months and last 6 months. An initial performance review must be recommended to the supervisor for those hired in last 3 months. A initial performance review must be also be recommended to supervisors for employees hired in last 6 months.

Find Criteria:
Same as above, except date range is beginning to end of the current month.

**Employees Hired within last 2.5 months**  
Purpose: to identify newly hired, benefits-eligible staff and take the following actions
- notify employee that his/her 90-day health insurance wait is about to end.
- Find out if they signed the insurance waiver or elected to take the health insurance coverage. If coverage elected, what plan did they select (employee only, family, etc).
- Complete the Fringe Benefit calculator based on the health insurance options selected. Add a statement “I understand that my cost center will be charged for the fringe benefits shown.” Add a line for PI Signature and Date.
- Give to PI for signature. File.
- Verify that the FMP Assignment and Ledger are encumbered for the health insurance option chosen.

Find Criteria:
Same as above, but date range will cover the 2.5 month period.

**Un-expended Payroll by Month: To be run upon request of DBA; Reconcilers Will Verify Un-expended payroll during their monthly reconciliations. This report is a checkpoint for overall un-expended payroll.**  
Purpose: to identify any payroll assignments that did not post to the cost center as expected. Investigate the reason and resolve.

Find Criteria:
From the PayrollEXP/ENC List layout, enter the following search criteria:

C:\Documents and Settings\Iria\Desktop\Reports_Payroll.doc
Then, use the Layout menu (on the left menu) to navigate to the Monthly List Layout:

Choose “Monthly List” from this drop down menu.

Enter an = (equal sign) in the field of the month you are running the report for. Example, if you want to find unexpended payroll for the month of October, enter = in the October field.

Press the enter key.

Find Results:
Review the dates of each record to determine whether salary was expected in the given month.

**Welch Support Eligibility: 5-year PhD Limit**

**Purpose:** to identify research staff employees who will exceed the 5-year PhD limit within the current fiscal year.

**Navigation**
- FileMaker Pro
- HR Payroll
- Current Assignment ("Employee Information" screen should appear)
- Find:
  - "Employee Type" – Select ‘Staff-Research’ from this drop down menu.
  - "Date PhD Awarded" - Type less than sign and date in this field. (Example: < 09/01/2002). To calculate the date, take your current fiscal year, 2007, subtract 5. You get 2002. Do a find for all degrees awarded prior to 2002 and you will get all employees who will have exceeded the five-year limit during the current fiscal year.
  - "Status Box" – Select “Active” from the drop down menu.
  - Enter

- Review the results and make sure that:
  a) None of the employees listed are currently supported on a Welch grant.
  b) None of the employees listed will be supported on a Welch grant once they reach the 5-year anniversary of their PhD date. If their assignment extends beyond their PhD anniversary date, notify the PI. Support on the Welch must end on their anniversary date and the funding source must be changed or the assignment ended.
**Welch Support Eligibility: 3-year Employment Limit**

Purpose: to identify research staff employees who exceed the 3-year employment limit.

Navigation
- FileMaker Pro
- HR Payroll
- Current Assignment ("Employee Information" screen should appear)
- Find:
  - "No. of Year Supported on Welch" - Type greater than sign and number of months equal to 36 (3 years) in this field. (Example: >36)

Note:
The number of records in the found set will appear in the gray status area on the left on the screen. You may scroll through or print each record. Anyone supported for more than 3 years is out of compliance with Welch guidelines. Appropriate action must be taken to become compliant (request an exception; reallocate charges to a non-grant).