Agenda

- Staff Council
- Staff Success Center
- Well-Being with Jessica Gargus
- Wellness (April Poll Topic Winner)
- ePerformance and merit guidelines
- PCQ pause
- IT email update with Karl Lutzen
- Courtesy appointments
- Independent Contractors with Lisa Alderson
- Student employment reminders
- Full/Part time designation
- Discussion rooms:
  - Courtesy Appointments
Well-Being
Jessica Gargus

Director, Student Well-Being and Certified Health Education Specialist
gargusj@mst.edu
Staff Council
Jackie Sansone
https://staffcouncil.mst.edu/
Promoting Work-Life Balance

Considerations:

- Build in breaks
- Set boundaries
- Limit taking on new ideas/projects
- Delegate when possible
- Plan for time off
Managing for Mental Well-Being

Guidance for managing employees who express concerns

- Educate yourself
- Psychological safety
  - Listen without judgement
  - Check-in often
  - Develop a response plan
- Identify signs and triggers
- Create consistent communication channels
- Review expectations, adjust where needed
- Delegate when possible
- Plan for time off
- Any employee may request an accommodation because of a disability. These requests are handled by Equity and Title IX and can be submitted at: equity.mst.edu
Promoting Employee Benefits

Discussing the benefits of working at S&T

- Social media campaign
- Getting to know candidates
- Make a benefits overview part of the interview
- Discuss culture & climate
ePerformance Rated Check-in

- Staff Self-Evaluations are open and due April 28th
- Rated Evaluations are due by Managers on June 16th
PCQ Pause

▶ Each year, there is a short pause on processing reclassifications as to not overlap with the budgeting and merit increase processes. This action is taken to ensure the proper application of the merit and wage guidelines and also reduce potential errors in and manual processing of pay changes during the budgeting and merit increase cycles.

▶ For 2023, the pause will begin in June with reclassification resuming in August. Please note the following:
  • Any classification or reclassification requests already submitted prior to July 1 will continue through the approval and evaluation process.
  • The pause does not apply to new or vacant positions.
▶ Contact your HR Partner for additional information.
Nonemployee Mailbox License Changing
Karl Lutzen
Information Security Officer
Upcoming Changes to Nonemployee Mailbox Licensing

- Moving from A1 Free Mailbox license to A5 Paid Mailbox license to get mailbox enrolled with the Security Operations Center
Nonemployee Appointments
(Courtesy/volunteer job codes, emeritus are excluded)

- 247 appointments still need to be either updated or terminated
- Deadline: July 1
- Overall progress:
  - March 1: 706
  - April 19: 472
  - May 16: 399
- Active appointments:
  - 2002-2010: 11
  - 2011-2020: 118
  - 2021: 62
  - 2022: 113
  - 2023: 95
Nonemployee Appointments
(Courtesy/volunteer job codes, emeritus are excluded)

Looking forward:

• All new appointments must have auto term dates, max time for an appointment is 1 year
• Department contacts will receive a monthly report of all current appointments and auto term dates starting in July
• To extend an existing appointment, a new ePAF will need to be created with the same effective date as the auto term date. New signed staff volunteer sheet will also need to be completed, signed, and attached.
• Appointments should still be terminated before the auto term date if they are no longer needed
Independent Contractor or Employee?
Lisa Alderson
Fiscal Services
lisaj@mst.edu or 573-341-4189
Welcome to Contract System!
Employee vs Independent Contractor

EMPLOYEE

Hired to work on a regular basis, under one employer for a fixed compensation

Process through HR/Payroll

INDEPENDENT CONTRACTOR

Hired to work on a project basis, paid for the service alone

Process through Contract/Voucher
Who’s the Boss?

Considerations:

- Behavioral Control – How/When/Where to do the work
- Financial Control – Significant investment and opportunity for profit/loss
- Work-Business Relationship
## Factors for determination

<table>
<thead>
<tr>
<th>Factor</th>
<th>Employee</th>
<th>Independent Contractor</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Length of Relationship</strong></td>
<td>On-going relationship between employee and employer.</td>
<td>Relationship has an end-date set by a contract.</td>
</tr>
<tr>
<td><strong>Work Hours</strong></td>
<td>Employer sets the schedule and work hours for the employee.</td>
<td>Contractor chooses their own schedule and hours.</td>
</tr>
<tr>
<td><strong>Supplies and Equipment</strong></td>
<td>Employer provides the employee with necessary supplies and</td>
<td>Contractor provides their own supplies and equipment.</td>
</tr>
<tr>
<td><strong>Training and Performance</strong></td>
<td>Employer provides training and sets standards for employee</td>
<td>Contractor is already skilled and able to perform the task.</td>
</tr>
<tr>
<td><strong>Termination</strong></td>
<td>Employee can quit and employer can fire at any time.</td>
<td>Contract sets specific terms for how to terminate the relationship.</td>
</tr>
</tbody>
</table>
# Independent Contractor/Consultant Request

## Checklist requirement

### I GENERAL INFORMATION

<table>
<thead>
<tr>
<th>A. Individual's Name:</th>
<th></th>
</tr>
</thead>
</table>

| B. Individual's residency status for immigration purposes (check one): |
|-------------------------|---|
| U.S. Citizen            |   |
| Lawful Permanent Resident|   |
| Non-Resident (NRA) *    |   |

<table>
<thead>
<tr>
<th>C. Funding:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Non Grant</td>
</tr>
<tr>
<td>Sponsored Project/Grant</td>
</tr>
</tbody>
</table>

*NOTE: Additional documentation is necessary for the University to make payment to an NRA.*

If grant-funded, name of project and project number:

<table>
<thead>
<tr>
<th>D. Department:</th>
<th></th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>E. Department Contact:</th>
<th></th>
</tr>
</thead>
</table>

### II WORK WILL BE PERFORMED BY A NON U.S. CITIZEN (non-resident alien)

Answer this question if the individual who will complete this work is a non-resident alien (see Section I, Question B, above):

Will the individual be completing ALL the required work outside the United States?

- [ ] Yes
- [ ] No

*If the answer is "No" continue to Section III of this document.*
*If the answer is "Yes", skip sections III & IV and continue to Section V of this document.*

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Missouri University of Science and Technology
### Multiple Relationships with the University

<table>
<thead>
<tr>
<th></th>
<th>Question</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Does this individual currently perform similar work for the University (any campus, UM system or hospital) as an employee?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>B</td>
<td>Is it currently expected that the University will hire this individual as an employee immediately following the termination of his or her independent contractor services?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>C</td>
<td>During the 12 months prior to the date on which the independent contractor/consultant services will commence, did the individual have an official University appointment (including temporary) providing same or similar services?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>D</td>
<td>Does the University pay as employees others who perform essentially the same duties that are to be performed by this individual?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>E</td>
<td>Does the individual only provide services to the University of Missouri and not offer his/her services to the general public as part of a trade or business?</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

> If the answer is "No" to ALL questions III A - E, continue to section IV of this document.
> If the answer is "Yes" to ANY question: STOP

This individual would be classified as an employee. Contact Human Resources to begin the hire process. Completion of this Request is not necessary.
Independent Contractor/Consultant Request

Checklist requirement

**IV CLASSIFICATION GUIDELINES**

- Complete section A, B or C depending on the type of services performed by the individual.

**A. TEACHER / LECTURER / INSTRUCTOR**

1) Will the individual lecture at only a few class sessions and have no influence in assigning a grade or certifying the completion of a course?  
2) Will the individual teach a course that is neither a degree prerequisite for students nor provides credit for a University degree?  
3) Does or could the individual provide the same or similar services to other entities or to the general public as part of his/her trade or business?

- If the answer to EVERY question in Section IV-A (1-3) is “Yes”, continue to Sections V and VI of this document.
- If the answer to ANY question in Section is “No”, then complete IV-A-4 (the next question).

4) In performing instructional duties, will the individual primarily use course material or textbooks that are created, selected or provided by the individual or will the individual determine the course content or instructional sequence?

- If the answer to question 4 is “Yes”, then complete sections V and VI of this document.
- If the answer to question 4 is “No”: STOP

This individual would be classified as an employee. Contact Human Resources to begin the hire process. Completion of this Request is not necessary.
Independent Contractor/Consultant Request

Checklist requirement

IV CLASSIFICATION GUIDELINES, continued

B. RESEARCHER

Select the Relationship 1 or 2 based on which description best describes the work being performed

- Relationship 1: The individual will perform research for a University professor or employee under an arrangement whereby the University professor or employee determines how the work will be performed.

- If Relationship 1 best describes the situation: STOP
  This individual would be classified as an employee. Contact Human Resources to begin the hire process.
  Completion of this Request is not necessary.

- Relationship 2: The individual will serve in an advisory or consulting capacity with a University professor or employee.
  The individual will be working 'with' the University professor in a collaborative type arrangement.

- If Relationship 2 best describes the situation, please complete Sections V & VI of this document.

C. SERVICES NOT COVERED UNDER SECTION A OR B

1) Will the University set the number of hours and/or days of the week that the individual is required to work as opposed to allowing the individual to set his/her own work schedule?

2) Does or could the individual provide the same or similar services to other entities or to the general public as part of his/her trade or business?

   - If the answer to question IV-C-2 is "Yes", skip the next question (IV-C-3) & complete sections V and VI of this Request.

   - If the answer to question IV-C-2 is "No", go on to the next question (IV-C-3).

3) Will the University provide the individual with specific instructions regarding performance of the required work rather than rely on the individual's expertise?

   - If the answer to questions IV-C-3 is "Yes": STOP
     This Individual would be classified as an employee. Contact Human Resources to begin the hire process.
     Completion of this Request is not necessary.

   - If the answer to question IV-C-3 is "No", please complete sections V and VI of this Request.
Independent Contractor/Consultant Request

Checklist requirement

V. SUPPLEMENTAL & CONTRACT INFORMATION

A. Will the individual devote full-time to work for the University?
   - Yes  
   - No

B. Has the individual invested in facilities or equipment needed to perform this work?
   - Yes  
   - No

C. Will the University provide tools to complete the work other than specialized equipment?
   - Yes  
   - No

D. Is the individual required to provide the services personally?
   - Yes  
   - No

E. Will the University hire any assistants needed by the individual to perform these services?
   - Yes  
   - No

F. List any training or meetings the individual is required to attend:

G. At what location(s) will the individual perform the services?

H. Performance period:
   - Commencement Date:
   - Completion Date:

I. Contract price:
   - Services $________
   - Travel $________
   - Other $________
   - Total $________

   Type of pay:
   - Commission
   - Lump Sum
   - Salary
   - Hourly Wage

   Describe Other:

J. To be billed as (e.g. in full upon completion, 50% after first report, 50% after final report):

K. Invoices to be submitted for payment to:
   - ________
   - ________
   - ________

L. Complete ATTACHMENT A. Please be thorough and complete. The information provided will become part of the contract.

M. Obtain the signatures required in Section VI of this document.

N. Submit the completed and signed documents to Business Services.
Questions?
Lisa Alderson x 4189
Upcoming Opportunities

Staff Development Week

- May 17th: Records Management 101 3:00-4:00pm
- May 18th
  - Artificial Intelligence and Chatbots 8:30-9:30am
  - Saving Through Roth Contributions in my Retirement Plan 9:00-9:45am
  - Excel M365 Tips & Tricks 10:00-11:00am
  - Effective Discipline and Navigating Conflict 10:30am-12:00pm
  - Ready, Set, Read! A UM System Book Club 11:30am-1:00pm
  - The Missouri Innovation Center: Where Ideas Take Flight 12:30-1:30pm
  - Tips for Prioritizing and Managing Your Time at Work 1:30-2:30pm Third Thursday https://share.percipio.com/cd/AcUr8z3i
  - Sowing and Growing Hope 2:00-3:00pm
  - Adobe InDesign-Getting Started 2:30-3:30pm

Staff Appreciation Day is next Week!

- Career Planning and Charcuterie from 10:00am -12:00pm: Do you like visually planning out your next year or next 5 years? Do you like crackers and cheese? If your answer is yes to either or both of these questions—join Simone Waldon (ME), the manager of S&T’s Staff Success Center, for this vision board workshop! Take this time to get creative as you reflect on where you are now and where you see yourself in the future. Also…snacks on snacks.
Student Employment Reminders

- Use the Job Change ePAF to make the salary/FTE changes and put the return from leave of absence info in comments (email with more information will be included in the recap email)
- Students should not be working more hours than the FTE listed on their record
- When hiring students for summer and fall, make sure to use appropriate effective dates
- Students should not be working until the ePAFs are approved
- Terminate students if they will not be working in the summer or fall semesters
Full/Part Time Designation

- Change in designation of Full Time/Part Time in PS HR PRD effective 04/28/2023
- Full Time = Regular (Benefit Eligible)
- Part Time = Temporary (Non-Benefit Eligible)
- Benefit Eligible = 75% FTE or greater with appointment duration of 9 months or more*
- Existing records in Job Data and Position Management have been updated as well as ePAF logic

*Student titles are not benefit eligible
Future Meetings

Meetings will be held on the third Wednesday of each month. Specific dates for 2023 can be found on the website: https://hr.mst.edu/updates/hr-meetings/.

- Regular meeting time: 1:00pm-2:00pm
- Discussion room/breakout sessions: 2:00pm-2:30pm
- Zoom invite, agenda, and recap emails will be sent to the contact group. Please email hrs@mst.edu to add someone to the group.
- Past meeting presentations can also be found on the website: https://hr.mst.edu/updates/agendas/.
Questions?

Please join us again on June 21

Additional meeting dates are located on the website: https://hr.mst.edu/updates/hr-meetings/
Thank you for attending.

We appreciate all you do in support of our campus!
Discussion Rooms

» Courtesy Appointments with Rachel Norris