UNIVERSITY OF WISCONSIN
S E R V I C E   C E N T E R

Affinity Group 3
December 16, 2014

The Service Center Mission is to provide "best in class" HRIS and customer service to support the effective management of the University of Wisconsin System's Human Capital at the highest value.

Today's Agenda

- UW HR Mass Job Update Procedures and Guidelines
- WED – Wave 2
- ICI Annual Update Process – Reminder
- End of Year WDC Adjustments
- Health Wellness Incentives – 2014 – NOT LOADED
- Off-Cycle Checks Schedule for the Holidays
- New Check Correction Process
- Funding Reports To Run During Payroll Calc Periods
- Calendar Year End Payroll Funding Issues
- Calendar Year End Dates
- Payroll Schedule
- Institution Feedback & Updates
- Calendar Review
- Questions/Comments

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UW HR Mass Job Update
Procedures and Guidelines

- Overview of UW HR Mass Job Update Process

- Available Update Types

- Guidelines for the UW HR Mass Job Update Process

UW HR Mass Job Update Overview

- The primary purpose of the UW HR Mass Job Update process is to provide for a centralized procedural approach to make large volume updates to Job and Position Data in HRS.

- A centralized configuration approach was developed to provide for the primary update functionality.   This design allows for additional update types to be added with minimal effort by the development team.

- The UW HR Mass Job Update process will provide for a Return on Investment by:
  - Minimizing manual data entry
  - Providing increased Data Integrity and Audit Controls
  - Consolidating various stand alone custom update programs into one process
  - "Branding" the **UW HR Mass Job Update** process to promote and differentiate it from the Oracle delivered Mass Update process

UW HR Mass Job Update Types

Available Update Types

1. **Department Updates**
   - Utilized for moving a group of employees to a new Organizational Department
     - Example: Division reorganizations
   - Intra Institution updates can also be made
     - Example: OHR (UWMSN) to Service Center (UWSYS)

2. **Location Updates**
   - Utilized for moving a group of employees to a new Location
     - Example: New Building - A1078 (21 N. Park) to Y8006 (660 W WASHINGTON AVE STE 201)

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UW HR Mass Job Update Types

Available Update Types – Continued

3. **Expected Job End Date Changes**
   - Utilized for updating the EJED for a group of employees
     - Example: Extend Academic Staff returning after Short Work Break

4. **Reallocation Changes (Service Center only)**
   - Utilized for updating Salary Plan and Grade
     - Example: OSER Bulletin Updates

5. **Pay Rate Changes**
   - Utilized for updating all Pay Rate Changes
     - Examples: Pay Plan; Merit; Market Adjustments; etc.

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UW HR Mass Job Update Guidelines

- Institutions can request Department, Location, and Expected Job End Date changes by submitting a WiscIT to their Affinity Group
  - We project that Institution and Division Reorganizations will be a common utilization for the update process especially when Departments are being inactivated and employees need to be re assigned
- The current SC Organizational Department and Location Change Request forms can be utilized by institutions
  - A new EJED form has been developed
  - There is a PS Query Option as well if needed
- An initial two week service level agreement will be invoked
- Report Mode listings will be available if requested
- Post Update listings will be distributed to requestor

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WED – Wave 2 *Proposed*

- Benefits – Age 70 Report
  - The Age 70 report would identify employees who need a new ABBR entered into the system because they've reached age 70 and/or need benefits changed/terminated because they've reached the limiting age of the policy.

- Benefits - Incorrect Benefits Service Date (Less than 60 days)
  - The Benefit Service Date has not been updated to reflect prior WRS service. (Hires/Rehires less than 60 days old.) Employees whose benefits service date is incorrect could end up paying extra for their insurance.

- Benefits - Incorrect Benefits Service Date (More than 60 days)
  - The Benefit Service Date has not been updated to reflect prior WRS service. (Greater than 60 days old).

WED – Wave 2 *Proposed*

- Benefits – Jobs Terminated Benefits Active
  - This query will identify employees who have Action = 'TER' or 'RET' on all max effective dated benefit eligible empl records in Job Data and have active benefit coverages.

- Benefits – No Pay Basis Active Benefits
  - This query that will identify employees with employee records with action of 'TER' and a position with pay basis of 'N' and HR Status of 'A' exists. This employee must also have a coverage elect of 'E.'

- Benefits – Termed in Error Benefits Not Reinstated
  - This query will identify that have been terminated and have recently had benefits, but now have been rehired with no benefits.

WED – Wave 2 *Proposed*

- Human Resources – Over Maximum Under Minimum
  - Every title is assigned to a pay range which has a minimum and a maximum salary amount. This report identifies employees hired below the minimum set for the range or above the maximum for that range.

- Human Resources – Change Report Title from Missing Address to **Missing _Home_ Address**
  - This is an existing WED query that is being renamed upon request. This requires changes to some WED configuration, but there is no change to the underlying query that retrieves the data.

- Human Resources – Missing Business Address
  - Specific request from UWCOL and UWEXT. These institutions often have to get a UW WISC ID for parking – in order to do so, the employee has to have a business address. It has been decided to roll this out to all institutions with a 60-day Hire/Rehire criteria.

- Roll Out of these new and updated reports is planned for early 2015.

ICI Annual Update Process

- The ICI annual update process is coming

- New for 2015 – leave swap deadline

  - Employees often want to swap sick leave used for other leave when they see their ICI category change and premium increase

  - All leave swaps that will affect the ICI premium category must be requested by the employee and entered in HRS by the end of the day January 30, 2015

  - Once the ICI annual update process runs, any leave swaps will NOT change the 2015 ICI premium category

  - Communications and tools under development

- Plan now to attend the ICI annual update training during the afternoon of December 18 (1:30 – 3pm)

End of Year WDC Adjustments

- As we approach the end of 2014, we understand employees are trying to make changes to their December check.   To further assist with this process on tight timelines, please reference the details below for Wisconsin Deferred Comp (WDC) contributions relative to their payroll processing/pay dates.

- Bi-weekly – 12A:
- Classified employees that make a change on-line through WDC
    - If the employee is attempting to make a change for the 12/23/14 payroll check, he/she will need to contact the Service Center to make that request to his/her AG group to have a WiscIt created for manual processing.
    - These requests must be received prior to the following:
    - 12A bi-weekly payroll: Tuesday, December 16th

- Unclassified – 12M:
- Unclassified employees intending to increase or decrease their 2015 contributions

    - Entries MUST be done by 4:30p.m. on 12/17/2104.
    - If a date other than 1/1/2015 is received or a change request after 12/17/2015, please contact Margaret Denton at Margaret.denton@uwsa.edu before 12/22/2015 (which is the final calc date).

- NOTE: If employees make a one-time change to their account on-line, please advise them to review their account for 2015 no later than December 21, 2014.

Health Wellness Incentives – 2014 – NOT LOADED

Two Health Plans:

1. Dean Health Plan

2. Health Partners

For Two Months: November & December

Any incentive payments made to the employee by the above health plans in the last two months of 2014, will receive a taxable fringe adjustment on their W2. This file will be sent by ETF to the UW early January.

Payroll – Off-Cycle Checks Schedule for the Holidays

- Requests for Off-Cycle Checks payable on Tuesday, December 23 are due by noon on Monday, December 22.

- The Service Center will <u>not</u> print Off-Cycle Checks on December 26.

- The Service Center will print Off-Cycle Checks on December 30, 2014 and January 2, 2015.

New Check Correction Process

- The Service Center developed a new web form that replaced the Excel document previously used for submitting check corrections. The form is located on the Service Center web page, at: https://uwservice.wisc.edu/administration/check-correction/

- Training for this new process occurred on Tuesday November 11. The training focused on the steps taken in order for a check to be corrected because of an overpayment. The training presentation was recorded and made available here: https://uwservice.wisc.edu/presentations/

- The Service Center seeks your feedback. Is the new Check Correction Process more efficient? Do you have any suggestions for improvement? Was the training helpful?

Funding Reports To Run During Payroll Calc Periods

- The Finance Team will be processing the finance portion of several upcoming payrolls on a compressed schedule and/or overnight during holiday periods.

- It is particularly important during the next few payrolls to run funding reports every day the payroll is in calc and to promptly enter funding.

- After reviewing these reports, if at all possible, enter funding corrections by the end of the day before the next calc. Funding for payroll transactions in calc may be entered through the end of final calc day— but don't wait that long!

- *HINT*: Use Review Paycheck to troubleshoot puzzling listings on reports

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Funding Reports To Run During Payroll Calc Periods

- Run Funding Edit Errors Inquiry Report (Kb 24497) each day in the morning; report updates nightly; good multipurpose report. Navigation: Payroll for North America > Payroll Processing USA > Pay Period Reports > Funding Edit Errors Inquiry.

  - Review **Budget LVL Indicator** column. Funding entries are needed for employees with blank or "D" in this column.

  - Review **Error Desc** Column. Funding entries or action needed for anything other than "Valid" in Error Desc column

- Run No Appointment Level Funding Query (Kb 20899); each day at end of day, INCLUDING FINAL CALC DAY; report provides live results, even after final calc. Navigation: Reporting Tools > Query > Query Viewer > UW_FI_NO_APPT_LVL_Funding.   Funding entries are needed for employees on listing.

Funding Reports To Run During Payroll Calc Periods

- Run the Suspense Funding Report Query (Kb 21029)); each day at end of day, INCLUDING FINAL CALC DAY; report provides live results. Navigation: Reporting Tools > Query > Query Viewer > UW_FI_SUSPENSE_FUNDING. It is critical to enter funding for employees listed in this report ASAP, but by no later than the end of the work day of final calc day.

Calendar Year End (CYE) Payroll Funding Issues

- Each year the Service Center processes a calendar year end payroll (CYE) in late February. Although payments will have been made months earlier, the accounting entries will not post to WISDM until approximately March 1.

- The following payroll payments are processed in the CYE payroll and therefore will have delayed WISDM accounting entries:
  - Monthly employees off cycle payrolls paid after the 11M final calc date (this year Nov. 24) and before 1/1/2015
  - Biweekly employees off cycle payrolls paid after the **12A** final calc date (this year Dec. 17) and before 1/1/2015

- Grant accountants, controllers and fiscal representatives are concerned about off cycle payments processed in the CYE payroll because of the delayed WISDM postings. Every effort should be made to include outstanding payments on or before the November monthly or 12A biweekly payrolls.

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Important Year-End Payroll Dates - 2014

Date	Event
12/01/2014	Last on-cycle pay date in 2014 for monthly paid staff
12/17/2014	Check Correction deadline to guarantee employees' original W-2s reflect the correct amounts
12/23/2014	Last on-cycle pay date in 2014 for bi-weekly paid staff
12/26/2014	NOON – Deadline for Missed Payroll submissions for inclusion on 2014 W-2s
12/30/2014	Last off-cycle check date for 2014 (bi-weekly and monthly paid staff)
01/02/2015	Final deadline for last minute Check Correction adjustments on an employee's W-2 (not guaranteed, based on volume)
01/09/2015	Deadline for Taxable Fringe Adjustments for calendar year 2014
01/20/2015	Targeted print date for 2014 W-2s
01/23/2015	Targeted print date for 2014 Fellowship/Scholarship Letters
01/29/2015	Targeted date for employees to begin receiving 2014 W-2s and Fellowship/Scholarship Letters
01/31/2015	IRS postmark deadline for employees 2014 W-2s
02/23/2015	Targeted print date for 2014 1042-S forms
03/01/2015	CYE posts to WISDM (approximately)
03/02/2015	Targeted date for employees to receive 2014 1042-S forms

2014BW12A

- Friday, December 12 *Overnight*
  - 12A paysheets created

- Monday, December 15
  - Payline request deadline – 4:30pm
  - Retro/payline load to payroll (overnight)

- Tuesday, December 16 – FICA deadline - Noon

- Wednesday, December 17
  - 12A confirm – **10:00am**

2014UNC12

- **Thursday, December 18 *Overnight***
  - 12M paysheets created
- **Friday, December 19**
  - Payline request deadline – 4:30pm
- **Saturday, December 20**
  - Retro/payline load to payroll (overnight)
- **Sunday, December 21**
  - FICA deadline - Noon {*Submit early (Friday) if possible*}
- **Monday, December 22 – 12M confirm - Noon**

2014BW12B

- Friday, December 26 – 12B paysheets created
- Sunday, December 28
  - Retro/payline load to payroll (overnight)
- Monday, December 29
  - Payline request deadline – Noon
    - {*Submit early (Friday) if possible*}
  - FICA deadline - Noon
- Tuesday, December 30 – 12B confirm - Noon

Institutional Updates & Feedback

- UW-Stout
- UW-Superior
- UW-Colleges
- UW-Extension
- UW-Green Bay
- UW-Parkside
- UW-River Falls
- UWSA

Calendar Review

December 2014

Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	1 [12M] Pay Period Begin / [11M] Pay Date / [11C] 2nd Batch Prelim Calc	2 [11C] 3rd Batch Prelim Calc	3 [11C] 4th Batch Prelim Calc / [11C] FICA Deadline	4 [11C] Confirmation Deadline (Eve) / [11C] Final Calc	5	6
7	8	9	10	11 [11C] Pay Date	12 [12A] 1st Batch Prelim Calc	13 [12A] Pay Period End
14 [12B] Pay Period Begin / [12A] 2nd Batch Prelim Calc	15 [12A] 3rd Batch Prelim Calc	16 [12A] 4th Batch Prelim Calc / [12A] FICA Deadline	17 [12A] Confirmation Deadline (Eve) / [12A] Final Calc	18 [12M] 1st Batch Prelim Calc	19 [12M] 2nd Batch Prelim Calc	20 [12M] 3rd Batch Prelim Calc
21 [12M] 4th Batch Prelim Calc / [12M] FICA Deadline	22 [12M] Final Calc / [12M] Confirmation Deadline (Eve)	23 [12A] Pay Date	24 Christmas Eve	25 Christmas Day	26 [12B] 1st Batch Prelim Calc	27 [12B] 2nd Batch Prelim Calc / [12B] Pay Period End
28 [12B] 3rd Batch Prelim Calc / [1A] Pay Period Begin	29 [12B] FICA Deadline / [12B] 4th Batch Prelim Calc	30 [12B] Final Calc / [12B] Confirmation Deadline (Eve)	31 [12M] Pay Period End / New Year's Eve	1	2	3

Questions?