
UNIVERSITY OF WISCONSIN
SERVICE CENTER

Affinity Group 3

April 21, 2015

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

- Introduction
- Academic-Year Paycheck Options
- Rollout of HRS HR Learning Path
- EJED Process
- Fiscal Year End Key Dates
- 4B & 4M Payroll – Important Dates/Deadlines
- Institution Feedback & Updates
- Calendar Review
- Questions/Comments

Academic-Year Paycheck Options

- Educational Campaign
- Focus on 9-month Employees
- Target for Roll-out: Late Summer 2015
- 2 Points of Emphasis:
 - Cash-flow Issues
 - Resources:
 - Direct Deposit Form (and instructions)
 - Institution Payroll Contacts
 - FAQ
 - Tax Issues
 - Resources:
 - W-4 Form
 - IRS Tax Information
 - Paycheck Modeling Tools
 - FAQ
 - Question: What Else Would You Need to Support This Effort?

Reminder - Rollout of HRS HR Learning Path

- Overview: The UW Service Center (UWSC) Professional Development team is looking to roll out a major component of the HRS Credentialing program, the HR Learning Path, and we need your help. Please see the information provided below for how you can help us lead your staff down the HR Learning Path to greater HRS success!
- Background: Ever since the UW institutions went live with the HRS system, the UW Service Center has been working diligently towards achieving a state of stabilization. Internal and external assessments of the HRS implementation have consistently identified inadequate end-user training as one of the major stepping stones to HRS stabilization. In order to address this issue, the UWSC has been charged with developing and implementing a training program for 'credentialing' HRS end-users, that connects demonstrated knowledge of HRS-supported business processes with security access to the pages of the HRS system.
- The UWSC Professional Development team has established 'Learning Paths' as the framework for our overall HRS credentialing curriculum. The HR Learning Path described below is the first fully-developed Learning Path to be deployed; as we move forward with the HRS credentialing program there will be an equivalent Learning Path for each HRS module.

Reminder - Rollout of HRS HR Learning Path

- **REMINDER Action Needed:**
- Step 1: Review the HR Learning Path
 - The HR Learning Path is composed of six e-learning and three classroom-based classes.
 - Prerequisites to the HR Learning Path are Intro. to HRS and Onboarding E-learning – these are required courses for all HRS end-users, regardless of individual job responsibilities.
 - Other classes within the HR Learning Path are assigned by security role(s) – all users will be required to either test out of these classes, or to successfully complete the training for the classes that match their security access.
 - There is a test-out option available for each class in the HR Learning Path (after Intro. to HRS and Onboarding E-learning).
- Step 2: Review Credential Tracking Spreadsheet
 - Each campus should review their Credential Tracking spreadsheet to determine if the roles listed for the HRS users at their campus are correct.
 - Make any edits/changes as necessary and return the corrected spreadsheet to the UWSC Professional Development team.
- Step 3: Help with HRS Professional Development Scheduling
 - Provide prospective dates/times for the Professional Development Team to come to your institution to deliver Intro. to HRS Training and HR Learning Path Test-out Option. We would like to schedule a visit to every institution by the end of May
 - Provide a campus contact to coordinate dates/times.
 - Let us know how many people are interested in the test-out option for each class.
 - **Please reply with prospective dates/times by end-of-day, Friday, April 10th.**

EJED Process

- Service Center sent out the EJED spreadsheet **March 9th**
 - It contains a column titled “**Extend_Y_N**”
 - EJED Extended = Enter Y in the “**Extend_Y_N**” field
 - EJED Not Extended = Enter N in the “**Extend_Y_N**” field
- The EJED will be updated to the day before the 2015-2016 Academic Year begins.
- Deadline: **April 24th**
- The Service Center will extend employees with a “Y” value through a batch process the **weekend of May 2nd**.
 - If you become aware of an employee that needs to be extended after this process runs, the campus will have to manually update those EJEDs.



AG3

Fiscal Year End Key Dates

April 21, 2015

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Fiscal Year End Key Dates – May/June

All dates tentative and subject to change

May 18 – 19	Test Budget Import – results sent to business units
May 27 <small>(Revised Date)</small>	Short Work Break Job Data Row Insert
May 30 <small>(New Date)</small>	FICA Job Data Row Insert
June 5	Funding Page Lockout (Notice Will Be Sent)
June 8	Budget Import
June 9	Funding Rollover for Valid Funding
June 10	Expected Funding Page Unlock (Notice Will Be Sent)
June 12	Encumbrance Full Reversal
June 17	Final 2015BW06A Biweekly Calc and Confirm (Morning Calc). Health and life (if any) use FY 2015 funding, but post to FY 2016. Salary and other fringes are posted to FY 2015.
June 19	Last day to request technical fixes for problematic direct retros that need to be posted to fiscal year 2015
June 22	Final 2015UNC06 Monthly Calc and Confirm; Final FY 2015 unclassified payroll. <ul style="list-style-type: none">▪ Overnight processing▪ Ensure correct funding is in place for all employees, as options to process salary cost transfers/direct retros on this payroll that post to FY 2015 will be limited or not available.▪ C-Basis prepaids use FY 2015 funding, but post to FY 2016.▪ A-Basis health and life fringe use FY 2015 funding, but post to FY 2016.▪ Summer session (S-Basis) salary and fringe use FY 2015 funding, but post to FY 2016.▪ All other salary and fringes post to FY 2015.▪ OSHKOSH ONLY: FY 2016 funding (effective 7/1/2015) for C-Basis prepaids must be in place on C-Basis position.
June 22	MADISON ONLY: Salary Cost Transfers (SCTs) processed through Cost Transfer Tool for FY 2015 must be fully approved by June 22 to guarantee entry into FY 2015. After this cutoff date,

Fiscal Year End Key Dates – July/August

July 2	<ul style="list-style-type: none">▪ Final 2015BW06B Biweekly Calc and Confirm.▪ Ensure correct funding is in place for all employees, as options to process salary cost transfers/direct retros on this payroll posting to FY 2015 will be limited or not available.▪ Life and health (if any) fringe use FY 2015 funding, but post to FY 2016.▪ All other salary and fringes posted to FY 2015.
July 5, 10, 11	Placeholder dates for HR Design/UPS Job Data Row Inserts
July 7-11	Encumbrance Initialization Process (depends on HR Design/UPS Job Row Insert)
July 8	Last day to submit for batch processing FY 2015 Direct Retros (Except Madison), with processing as early as 12:01 AM, depending on volume. Direct retros for all PRDFLT, PRSUSP, and Account 1000 transactions not at \$0 must be submitted for batch processing.
July 20	First day for Salary Cost Transfers/Direct Retros to be processed and posted in FY 2016
July 16	<ul style="list-style-type: none">▪ Final 2015BW07A Biweekly Calc and Confirm.▪ Payroll is for the period 6/28/15 – 7/11/2015 and crosses fiscal years.▪ Biweekly employees being paid for dates prior to 7/1/2015 must have FY 2015 funding valid through 6/30/15 in place.▪ Biweekly employees being paid for 7/1/2015 or later must have FY 2016 funding effective 7/1/15 (or hire date after 7/1) in place.▪ Payments for 6/28/15 - 6/30/15 use FY 2015 funding, but post to FY 2016▪ Payments for 7/1/15 – 7/11/2015 use FY 2016 funding and post to FY 2016
July 23	<p>Final 2015UNC07 Monthly Calc and Confirm.</p> <ul style="list-style-type: none">▪ Payroll crosses fiscal years for summer positions, except Oshkosh.▪ FY 2015 funding for S-Basis and V-Basis positions with a Hire/Rehire/Transfer/Department Change prior to 7/1/2015 must be in place effective with the date of the Job Data action.▪ FY 2016 funding effective 7/1/15 must be in place on all unclassified positions, including C-Basis positions with prepaids
August 21	Return from Short Work Break, Job Data Row Insert

Payrolls That Cross Fiscal Years - Biweekly

Biweekly Pay Schedule Classified and Student Hourly

Pay Period	Pay Run ID	Pay Period	Pay Date
Jul A	2015BW07A	06/28/2015 - 07/11/2015	07/23/2015

Crosses Fiscal Year





Salary and all fringes for entire 2015BW07A pay period will be posted to FY 2016, whether or not funding is changing between fiscal years. The following outlines how funding is applied.

- Fiscal Year 2015:
 - Populates funding for 6/28/2015 - 6/30/2015 of 2015BW07A pay period
 - Funding is for 3/7 of Week 1 payroll if employee has an active appointment on 6/28/2015, even if employee did not actually work on 6/28, 6/29 or 6/30
 - A FY 2015 funding entry with an effective date of 6/28/2015 is needed if FY 2016 funding changes from FY 2015 funding if the entire 2015BW07A pay period should be charged to the new FY 2016 funding
- Fiscal Year 2016:
 - Populates funding for 7/1/2015-7/11/2015 of 2015BW07A pay period
 - Funding is for 4/7 of Week 1 payroll plus Week 2 payroll, if employee has an active appointment as of 7/1/2015

Funding Chart Fields Are Setup by Controllers

Payrolls That Cross Fiscal Years - Monthly

- Campuses: Madison * = A; (AG1)
 Eau Claire * = C / Stevens Point * = K; (AG2)
 Green Bay * = D / River Falls * = J / Stout * = L; (AG3)



Pay Run ID	Pay Group	Period Begin Date	Period End Date	Payment Date
2015UNC07	ARG A-basis	07/01/2015	07/31/2015	07/31/2015
 →	S*R / S*9 Summer Session	06/22/2015	07/19/2015	07/31/2015
 →	V*R / V*5 / V*9 Summer Service	06/25/2015	07/24/2015	07/31/2015

Salary and all fringes for entire 2015UNC07 pay period will be posted to FY 2016, whether or not funding is changing between fiscal years. The following outlines how funding is applied.

- Fiscal Year 2015:
 - Populates funding for 6/22-6/30 (S-Basis) or 6/25-6/30 (V-Basis) of 2015UNC07 pay period for employees with an active appointment at the start of the pay period
 - A FY 2015 funding entry with an effective date of 6/22 (S-Basis) or 6/25 (V-Basis) is needed if FY 2016 funding changes from FY 2015 funding if the entire 2015UNC07 pay period should be charged to the new FY 2016 funding
- Fiscal Year 2016:
 - Populates funding for 7/1/2015 – through end of pay period
- Funding Chart Fields Are Setup by Controllers

Payrolls That Cross Fiscal Years - Monthly

- Campus: Parkside (AG3)



Pay Run ID	Pay Group	Period Begin Date	Period End Date	Payment Date
2015UNC07	ARG A-basis	07/01/2015	07/31/2015	07/31/2015
	SGR/SG9 Summer Session	06/21/2015	07/18/2015	07/31/2015
	VGR/VG5/VG9 Summer Service	06/24/2015	07/24/2015	07/31/2015

Salary and all fringes for entire 2015UNC07 pay period will be posted to FY 2016, whether or not funding is changing between fiscal years. The following outlines how funding is applied.

- Fiscal Year 2015:
 - Populates funding for 6/21-6/30 (S-Basis) or 6/24-6/30 (V-Basis) of 2015UNC07 pay period for employees with an active appointment at the start of the pay period
 - A FY 2015 funding entry with an effective date of 6/21 (S-Basis) or 6/24 (V-Basis) is needed if FY 2016 funding changes from FY 2015 funding if the entire 2015UNC07 pay period should be charged to the new FY 2016 funding
- Fiscal Year 2016:
 - Populates funding for 7/1/2015 – through end of pay period
- Funding Chart Fields Are Setup by Controllers

Payrolls That Cross Fiscal Years - Monthly

- Campus: Superior (AG3)



Pay Run ID	Pay Group	Period Begin Date	Period End Date	Payment Date
2015UNC07	ARG A-basis	07/01/2015	07/31/2015	07/31/2015
 →	SMR/SM9 Summer Session	06/22/2015	07/19/2015	07/31/2015
 →	VMR/VM5/VM9 Summer Service	06/25/2015	07/25/2015	07/31/2015

Salary and all fringes for entire 2015UNC07 pay period will be posted to FY 2016, whether or not funding is changing between fiscal years. The following outlines how funding is applied.

- Fiscal Year 2015:
 - Populates funding for 6/22-6/30 (S-Basis) or 6/25-6/30 (V-Basis) of 2015UNC07 pay period for employees with an active appointment at the start of the pay period
 - A FY 2015 funding entry with an effective date of 6/22 (S-Basis) or 6/25 (V-Basis) is needed if FY 2016 funding changes from FY 2015 funding if the entire 2015UNC07 pay period should be charged to the new FY 2016 funding
- Fiscal Year 2016:
 - Populates funding for 7/1/2015 – through end of pay period
- Funding Chart Fields Are Setup by Controllers

Payrolls That Cross Fiscal Years - Monthly

- Campus: Colleges (AG3)

Pay Run ID	Pay Group	Period Begin Date	Period End Date	Payment Date
2015UNC07	ARG A-basis	07/01/2015	07/31/2015	07/31/2015
 →	SRR/SR9 Summer Session	06/22/2015	07/19/2015	07/31/2015
 →	VRR/VR5/VR9 Summer Service	06/25/2015	07/25/2015	07/31/2015

Salary and all fringes for entire 2015UNC07 pay period will be posted to FY 2016, whether or not funding is changing between fiscal years. The following outlines how funding is applied.

- Fiscal Year 2015:
 - Populates funding for 6/22-6/30 (S-Basis) or 6/25-6/30 (V-Basis) of 2015UNC07 pay period for employees with an active appointment at the start of the pay period
 - A FY 2015 funding entry with an effective date of 6/22 (S-Basis) or 6/25 (V-Basis) is needed if FY 2016 funding changes from FY 2015 funding if the entire 2015UNC07 pay period should be charged to the new FY 2016 funding
- Fiscal Year 2016:
 - Populates funding for 7/1/2015 – through end of pay period
- Funding Chart Fields Are Setup by Controllers

Fiscal Year End – Coming Soon

- Fiscal Year End 2015 Web Page:
<https://uwservice.wisc.edu/administration/finance>
This page is now available and will incorporate all FYE communications and presentations
- Presentations to AG Groups and Controllers (week of April 20) and Madison FMM (presented April 15)
- Updated Information on Calendars that Cross Fiscal Years for S-Basis and V-Basis Employees for All Campuses (presented to AG Groups on April 21)
- E-mail Communication Summarizing Above
- Communications will be sent to Controllers, Campus Site Leads, Payroll and Benefit Coordinators, HR Representatives, Grant Accountants (where applicable), AG Groups, Budget Officers (where applicable), Fiscal Year End Mailing List

4B Payroll – Important Dates/Deadlines

- 4/17/15 – Paysheets created (overnight)
- 4/20/15 – Payline request deadline – 4:30pm
- 4/20/15 – Payline and retro load (overnight)
- 4/21/15 – FICA deadline – Noon
- 4/21/15 – Absence Event entry best practice due date – 8:00 p.m.
- 4/22/15 – Final calc/confirmation – **10:00am**

Sun	Mon	Tue	Wed	Thu	Fri	Sat
12	13	14	15	16 [4A] Pay Date	17 [4B] 1st Batch Prelim Calc	18 [4B] Pay Period End [4B] 2nd Batch Prelim Calc
19 [4B] 3rd Batch Prelim Calc [5A] Pay Period Begin	20 [4B] Payroll and Benefit Retro and Payline Load [4B] 4th Batch Prelim Calc	21 [4B] 5th Batch Prelim Calc [4B] FICA Deadline	22 [4M] 1st Batch Prelim Calc [4B] Final Calc [4B] Confirmation Deadline (Eve)	23 [4M] 2nd Batch Prelim Calc	24 [4M] 3rd Batch Prelim Calc	25 [4M] 4th Batch Prelim Calc [4M] Payroll and Benefit Retro and Payline Load

4M Payroll-Important Dates/Deadlines

- 4/22/15 – Paysheets created (overnight)
- 4/24/15 – Payline request deadline – 4:30pm
- 4/25/15 – Payline and retro load (overnight)
- 4/26/15 – FICA deadline – Noon
- 4/26/15 – Absence Event entry best practice due date – 8:00pm
- 4/27/15 – Final calc/confirmation – **10:00am**

Sun	Mon	Tue	Wed	Thu	Fri	Sat
19 [4B] 3rd Batch Prelim Calc [5A] Pay Period Begin	20 [4B] Payroll and Benefit Retro and Payline Load [4B] 4th Batch Prelim Calc	21 [4B] 5th Batch Prelim Calc [4B] FICA Deadline	22 [4M] 1st Batch Prelim Calc [4B] Final Calc [4B] Confirmation Deadline (Eve)	23 [4M] 2nd Batch Prelim Calc	24 [4M] 3rd Batch Prelim Calc	25 [4M] 4th Batch Prelim Calc [4M] Payroll and Benefit Retro and Payline Load
26 [4M] 5th Batch Prelim Calc [4M] FICA Deadline	27 [4M] Final Calc [4M] Confirmation Deadline (Morning)	28	29	30 [4B] Pay Date [4M] Pay Period End	1	2

Other Considerations

- 4/22/15 – Heavy processing night (confirming 4B and starting 4M). Payroll edit may not be available right away in the morning of 4/23/15
- Absence Management jobs are being modified to help get the edit delivered as early as possible
 - Classified and Unclassified absence balances may not be viewable/accurate in HRS for much of 4/23/15
 - Absence entry is still possible on 4/23

Institutional Updates & Feedback

- UW-River Falls
- UW System Administration
- UW-Stout
- UW-Superior
- UW Colleges
- UW-Extension
- UW-Green Bay
- UW-Parkside

Calendar Review

April 2015						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	1 [3M] Pay Date [4M] Pay Period Begin	2 [3B] Pay Date	3	4 [4A] Pay Period End
5 [4A] 1st Batch Prelim Calc [4B] Pay Period Begin	6 [4A] 2nd Batch Prelim Calc	7 [4A] 3rd Batch Prelim Calc [4A] Payroll and Benefit Retro and Payline Load	8 [4A] 4th Batch Prelim Calc [4A] FICA Deadline	9 [4A] Final Calc [4A] Confirmation Deadline (Eve)	10	11
12	13	14	15	16 [4A] Pay Date	17 [4B] 1st Batch Prelim Calc	18 [4B] Pay Period End [4B] 2nd Batch Prelim Calc
19 [4B] 3rd Batch Prelim Calc [5A] Pay Period Begin	20 [4B] Payroll and Benefit Retro and Payline Load [4B] 4th Batch Prelim Calc	21 [4B] 5th Batch Prelim Calc [4B] FICA Deadline	22 [4B] Final Calc [4B] Confirmation Deadline (Eve) [4M] 1st Batch Prelim Calc	23 [4M] 2nd Batch Prelim Calc	24 [4M] 3rd Batch Prelim Calc	25 [4M] 4th Batch Prelim Calc [4M] Payroll and Benefit Retro and Payline Load
26 [4M] 5th Batch Prelim Calc [4M] FICA Deadline	27 [4M] Final Calc [4M] Confirmation Deadline (Eve)	28	29	30 [4M] Pay Period End [4B] Pay Date	1	2

Calendar Review

← Today →						
May 2015 5A 5B 5C 5M						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	1 [5M] Pay Period Begin [4M] Pay Date	2 [5A] Pay Period End
3 [5A] 1st Batch Prelim Calc [5B] Pay Period Begin	4 [5A] 2nd Batch Prelim Calc	5 [5A] 3rd Batch Prelim Calc [5A] Payroll and Benefit Retro and Payline Load	6 [5A] 4th Batch Prelim Calc [5A] FICA Deadline	7 [5A] Confirmation Deadline (Eve) [5A] Final Calc	8	9
10	11	12	13	14 [5A] Pay Date	15 [5B] 1st Batch Prelim Calc	16 [5B] Pay Period End
17 [5C] Pay Period Begin [5B] 2nd Batch Prelim Calc	18 [5B] Payroll and Benefit Retro and Payline Load [5B] 3rd Batch Prelim Calc	19 [5B] FICA Deadline [5B] 4th Batch Prelim Calc	20 [5B] Final Calc [5B] Confirmation Deadline (Eve)	21 [5M] 1st Batch Prelim Calc	22 [5M] 2nd Batch Prelim Calc	23 [5M] Payroll and Benefit Retro and Payline Load [5M] 3rd Batch Prelim Calc
24 [5M] 4th Batch Prelim Calc [5M] FICA Deadline	25 Memorial Day	26 [5M] Confirmation Deadline (Eve) [5M] Final Calc	27	28 [5B] Pay Date	29	30 [5C] Pay Period End
31 [5M] Pay Period End [6A] Pay Period Begin [5C] 1st Batch Prelim Calc	1	2	3	4	5	6

Questions?

