



## Affinity Group 3 Meeting August 11, 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

- HR Batch Processing – August
- UW Service Center Survey
- ABE - Expanding Confirmation Statements
- BN Campus Benefit Update Security Role
- Payroll - 2015 Salary Advance Requests
- FYE 2015 Testing and Production Stats
- Separation of Duties – WED User Acceptance Testing
- ALRA
- Institution Feedback
- Calendar Review
- Questions/Comments

# Monthly Expected Job End Data (EJED)

- Monthly EJED Processing
  - The Monthly EJED Process is scheduled to run on the evening of 08/14/2015 at the start of the nightly HRS Batch processing and prior to the 8M Payroll's first calculation.
  - It will run every evening during the 8M Payroll and one final time before the final calculation on 08/20/2015.
  - All Non-University Staff employees (ie. Employee Classes: AS, ET, FA, LI, OT, SA) that have an EJED value less than or equal to 08/31/2015 will be terminated.

# Return From Short Work Break

- RBK Batch Processing
  - The RBK Batch Process is scheduled to run on the evening of 08/21/2015 after all nightly HRS Batch processing has been completed.
  - All C-basis employees that were put on a Short Work Break by the SBK process will be returned to active status.
  - The effective date of the RBK will be the first day of the academic year per institution.

# UW Service Center Survey

We would appreciate your response to our UW Service Center customer survey. Please take a minute to see if these emails are going to your junk email folder in Outlook. If so, please take the steps below to allow the email to go to your Inbox.

- **Go to your Junk email folder**
- **Find the message and right-click it**
- **Point to Junk → Click Never Block Sender's Domain**

The screenshot shows the Outlook interface with the 'Junk Email [1]' folder selected in the left sidebar. A right-click context menu is open over an email from 'wiscit@doit.wisc.edu'. The 'Junk' option is highlighted, and a sub-menu is open showing 'Never Block Sender's Domain (@example.com)' selected. A red arrow points to the 'Right Click the message' instruction.

# ABE - Expanding Confirmation Statements

- Proposal: E-mail employees and send Cypress “Confirmation Statements” for all ABE enrollments whether Employee Self Service or paper:
  - Last year the Service Center sent confirmation statements to ESS institutions
  - ESS Confirmation Statements were very well received by employees and benefits administrators
- What do you think?

# Campus Benefit Update Security Role

- The Campus Benefit Update Security Role was adjusted to better meet institution business needs. KB #50289 was created to give a detailed list of page access.
- The following slides are a quick overview of changes made to the role:

# Campus Benefit Update Security Role

- Access Removed:
  - Processes that should only run through batch.
  - Delivered PeopleSoft reports that do not meet business needs.
  - Obsolete custom reports.
  - Benefits Billing Reprint Statements needed to be run by UWSC - incorrect reprint will cause the system to abend.



# Campus Benefit Update Security Role

- Changed Access:
  - Assign Benefit Program from correction access to view only.
  - Populate Eligibility Config – for selected population rather than all employees.

# Campus Benefit Update Security Role

- Added Access:
  - Access to run the New Hire Hold Report.
  - Access to view and update the Benefit Update Retro Ded Calc Results. This replaces the need for Benefit Administrators to request “PY Retro Payroll Process” which gives them access to Benefit Retro and Payroll Retro.
  - Access to view Arrears. This replaces the need for Benefit Administrators to separately request “PY Payroll Balance View” which gives them access to Arrears, Deductions, and Payroll balances.

# Payroll - 2015 Salary Advance Requests

Below, please find the updated, annual instructions for requesting Salary Advances.

The employee must complete the Salary Advance Request and Payroll Deduction Form found at: <https://www.wisconsin.edu/financial-administration/forms-and-publications/#salary>. This form must be kept at your office and is for your records.

There are a couple of options available to you for processing the salary advances for the 2015-2016 academic year:

1. You can use your Campus Contingent Fund to issue the salary advance payment with an Accounts Receivable Deduction set up on the employee's September payroll.
2. Have the Service Center process an off-cycle check for the Salary Advance and they will enter a negative gross on Add'l Pay for the employee's September payroll.

If you choose option 2, **requests for 2015 salary advances are due Friday, August 28, 2015**. Then you have two options on how you will send the necessary information to the Service Center for processing the payments.

1. Complete the attached spreadsheet and send it to your Affinity Group email address with 'Salary Advance 2015' in the Subject Line; messages with this subject line will go directly to the Support Center for creating a WiscIT Case.
2. Complete the request form located at: <https://uwservice.wisc.edu/administration/salary-advance/> which will go directly to the Support Center for creating a WiscIT Case.

# Payroll - 2015 Salary Advance Requests

Off-cycle checks created by the Service Center will be dated **September 10, 2015** and the normal distribution of off-cycle checks will be followed for all campuses.

Please refer to Financial & Administrative Policies #29, IV.F for the policy on salary advances: <https://www.wisconsin.edu/financial-administration/financial-administrative-policies-procedures/fppp/f29-rev-2-salary-and-fringe-benefits-calculations-for-unclassified-staff/>. **Salary Advances can only be requested for brand new unclassified employees and cannot exceed 35% of the employee's monthly gross pay.**

Please email questions to: [kingram@uwsa.edu](mailto:kingram@uwsa.edu).

# FYE 2015 Statistics

<b>Payroll</b>	<b>Funding going to Default/Suspense 2014</b>	<b>Funding going to Default/Suspense 2015</b>
6M	2189	65
7M	2162	30
8M	2297	?

# Separation of Duties – WED User Acceptance Testing

- We are still looking for participants in User Acceptance Testing (UAT) for the new process.
- If you are interested in participating in the UAT, please contact the SOD Project Manager, Brian Schildroth [bschildroth@uwsa.edu](mailto:bschildroth@uwsa.edu)
- Testing dates: August 24-28

# Annual ALRA Conversion

- Unclassified employees (academic staff, faculty and limited) with a 12-month appointment are eligible to bank unused vacation in an Annual Leave Reserve Account (ALRA). This is made available during their 11th fiscal year of employment. Note: The hours are placed in reserve at the end of that fiscal year. Unclassified vacation is allocated on a fiscal year basis. Unused vacation can be carried over into the following fiscal year, but must be used by the end of that fiscal year or it will be lost.
- The July Leave Report will indicate how many hours of unused vacation an employee is eligible to bank into ALRA. Eligible employees are allowed to bank any unused vacation as of June 30, 2015.

# Annual ALRA Conversion

- If the employee meets the eligibility requirements for ALRA:
  - They may transfer unused vacation hours into an ALRA account to use at a future date (banked hours do not expire).
  - They may accumulate hours in the ALRA from year to year without limit.



# Annual ALRA Conversion

- Employees will be offered the option to bank hours in July following the fiscal year in which the employee qualifies.
- Banking Schedule (the amount of leave that can be banked is prorated if part-time):
  - Employee is allowed to bank up to 40 hours of vacation into ALRA per year at the beginning of their 11th fiscal year of employment.
  - Employee is allowed to bank up to 80 hours of vacation into ALRA per year at the beginning of their 26th fiscal year of employment.
  - The hours are placed in reserve at the end of that fiscal year (the hours designated for ALRA will be included in the August Leave Report).

# ALRA

## Faculty, Academic Staff and Limited appointees - Annual Leave Reserve Account (ALRA)

Faculty, Academic Staff and Limited appointees may put unused vacation in an Annual Leave Reserve Account (ALRA) per the schedule below.

### Faculty, Academic Staff and Limited appointees ALRA Banking Schedule

Years of Service	Hours that can be placed in ALRA
First 10 Years	0
10+ to 25 Years	40
25 Years & Over	80

Eligibility to bank vacation begins in July following the fiscal year in which the employee qualifies based on years of service.

Faculty, Academic Staff and Limited appointees may not receive a cash payout of vacation.

# Annual ALRA Conversion

- When banking hours to ALRA, the vacation hours used will first come from any remaining Vacation Carryover as of June 30, 2015. If the employee allocates more unused vacation to ALRA than currently in Vacation Carryover, the additional hours to be banked will come from the new Vacation Carryover balance as of July 1, 2015 (vacation earned in the current fiscal year).

# Institutional Feedback

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

# Calendar Review

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

# Questions?

