

### Affinity Group 3 January 24, 2017

The University of Wisconsin Service Center will

- Serve...the people of the University of Wisconsin System
  - Collaborate...by being supportive and constructive
    - Act with Integrity...always and in all matters

### Agenda

- Welcome New AG Generalists
- February B Processing Update
- TAM UAT Update
- HRS 9.2 Demo
  - FN
  - PY
  - HR
  - BN
- CYE Important Date
- W2s mailed
  - Already available on portal
- Questions/Institution Feedback
- January Calendar Review
- Contact Us



### **New AG Generalists**

### AG1 Generalists:

- Rocky Thompson and Tom Sanders have joined AG1 and are supporting Madison and Milwaukee.
- Rocky has been with AG1 for 4 years as a support rep and has an Information Technology Infrastructure Library Certification.
- Tom Sanders has worked as a member of our SC Payroll team for the last 4 years and worked in payroll and benefits at UW-Madison prior to joining the SC. Tom has a Bachelors from UW-Madison and 2 Masters degrees (UW-Eau Claire and Edgewood).

### AG3 Generalist:

- Mai Xiong. Mai has joined AG3 and is supporting Colleges, Extension, Green Bay,
   Parkside, River Falls, Stout, Superior, and System Administration.
- Mai comes with over 7 years of experience in customer service, most recently employed with Wisconsin Physician Solutions. She is a UW-Whitewater graduate with a Bachelors of Business Administration in Human Resource Management.



### February B Processing Update

- In an effort to provide a smooth upgrade transition, the February B biweekly processing calendar will be shortened by one day.
- Paysheets will be created on Friday, February 17.
- Deadline for Payline Requests will be 4:30, Monday, February 20.
- PY & BN Retro and Payline Load will be included in the Monday, February 20 evening batch.
- Final Calc and Confirm will occur on Wednesday, February 22.
- More details will be provided as the date approaches.





### HRS 9.2 Upgrade Project

January 24, 2017

### TAM UAT

- Talent Acquisition Manager User Acceptance Testing:
  - Concludes on January 27
  - 24 Jobs Approved (as of Monday morning)
  - 1 WiscIT





### TAM User Acceptance Testing

### Final Report

- Brad will send a template for January 27 reporting by the Site Leaders (one report for all TAM UAT activity) <u>due January 31</u>
- Institutions are expected to complete <u>one</u> of each of the six scripts.
   However, institutions can have multiple testers and testers may complete multiple scripts





### TAM UAT Final Report

	TAM-01 Create AS	TAM-02 Create	TAM-03 Approve Job	TAM-04 Search	TAM-05 View	TAM-06 Accept Job
Name:	Job Opening with	University Staff	Opening	and Apply for Jobs	Application	Offer – Prepare for
	Screening	Job Opening		– Candidate	Materials –	Hire
Institution:				Gateway	Prepare and	
					Approve Job	
Date:					Offer	
Number Complete						
Pass						
Fail						





### 9.2 Upgrade Training Schedule

 Reminder: please send names and Empl IDs of employees for Benefits and TAM face-to-face training by end of today

- Registration will be completed at the Service Center using our Learning Management System (LMS)
  - Trainees will be contacted to coordinate dates and locations





### Questions





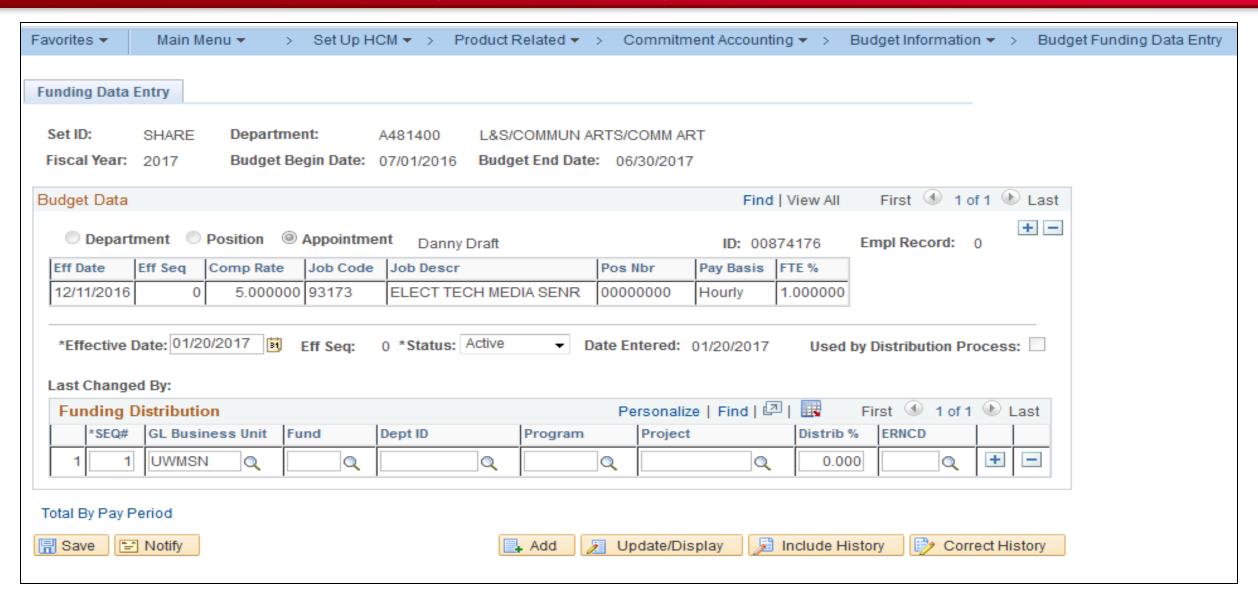


### 9.2 HRS Pages at a Glance

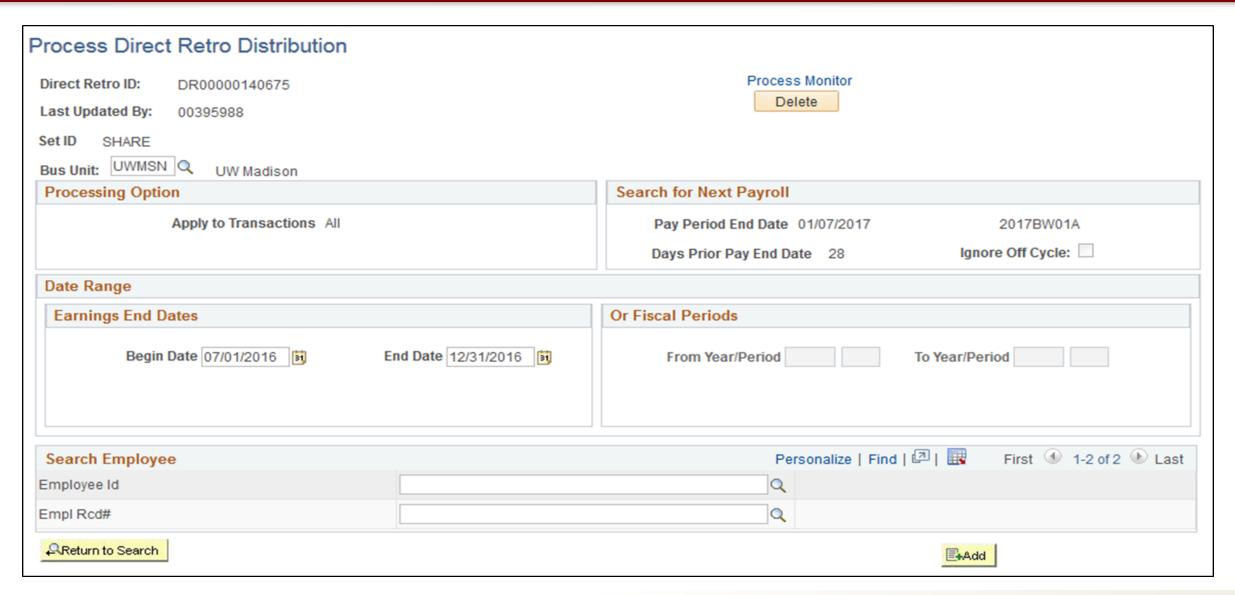
# Finance



### **Budget Funding Data Entry**

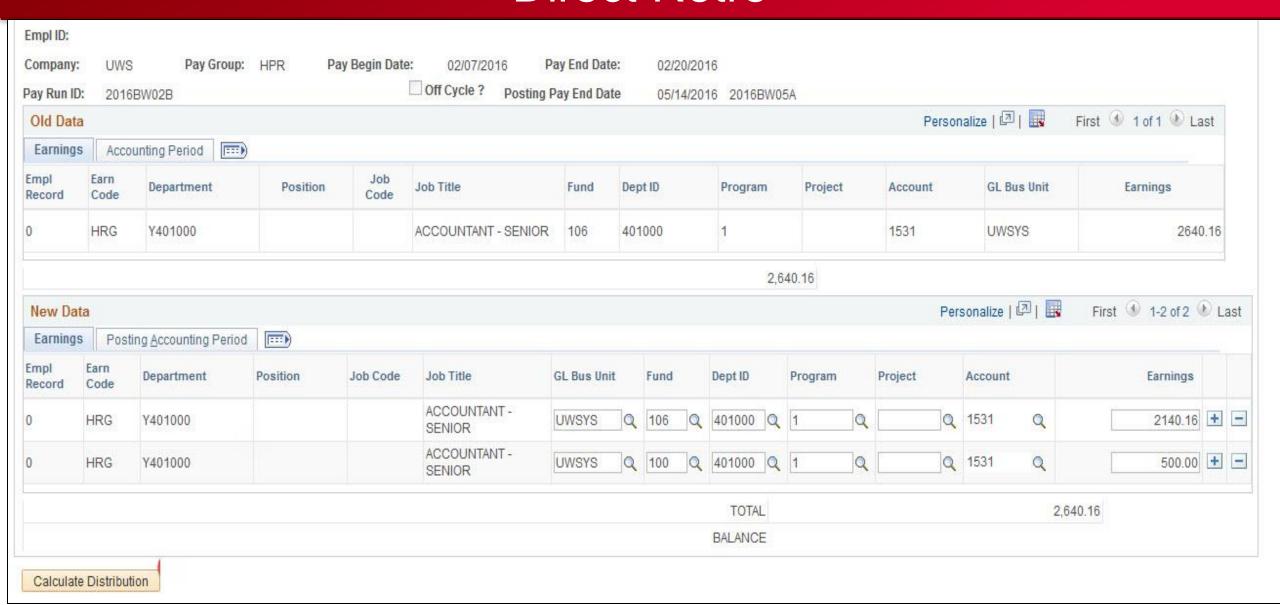


### Process Direct Retro





### Direct Retro



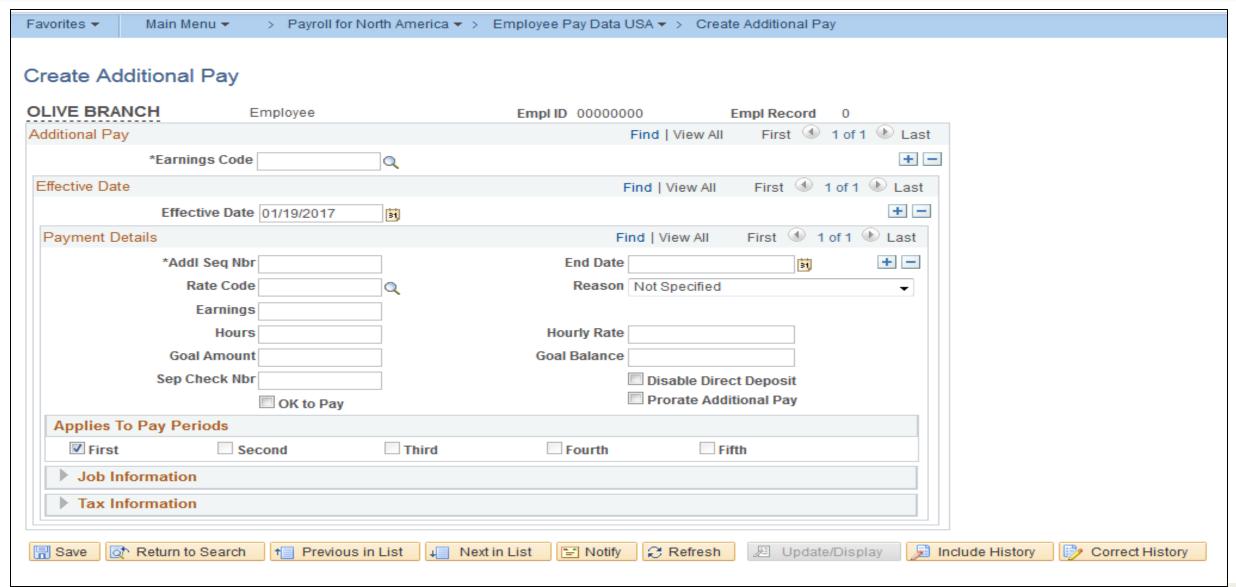


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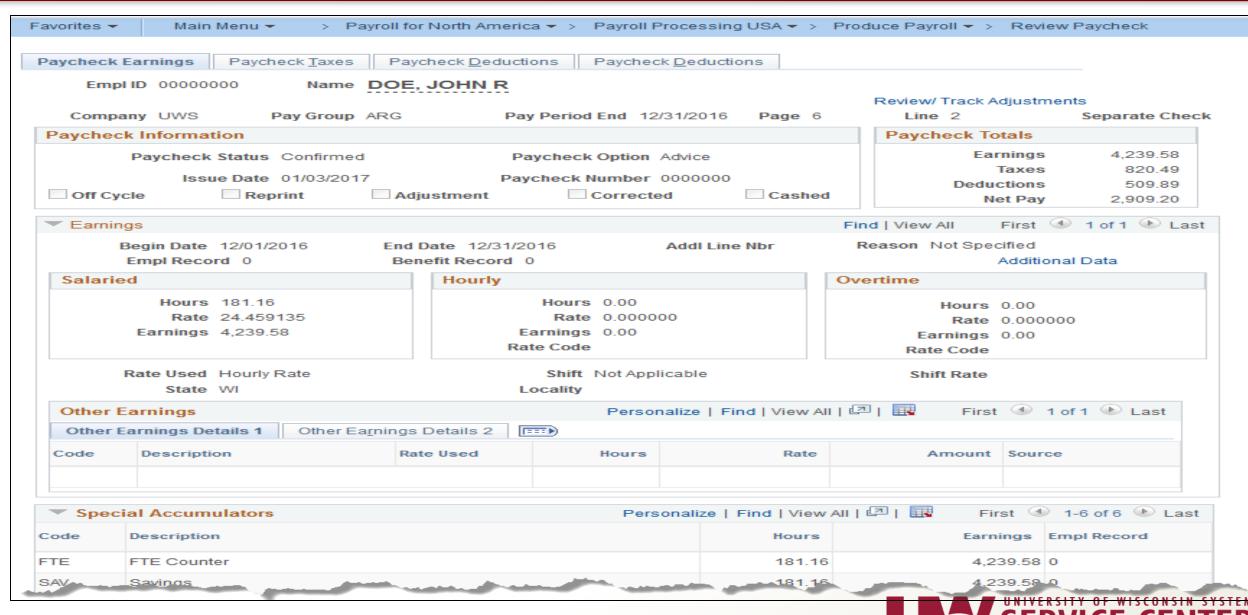
# Payroll



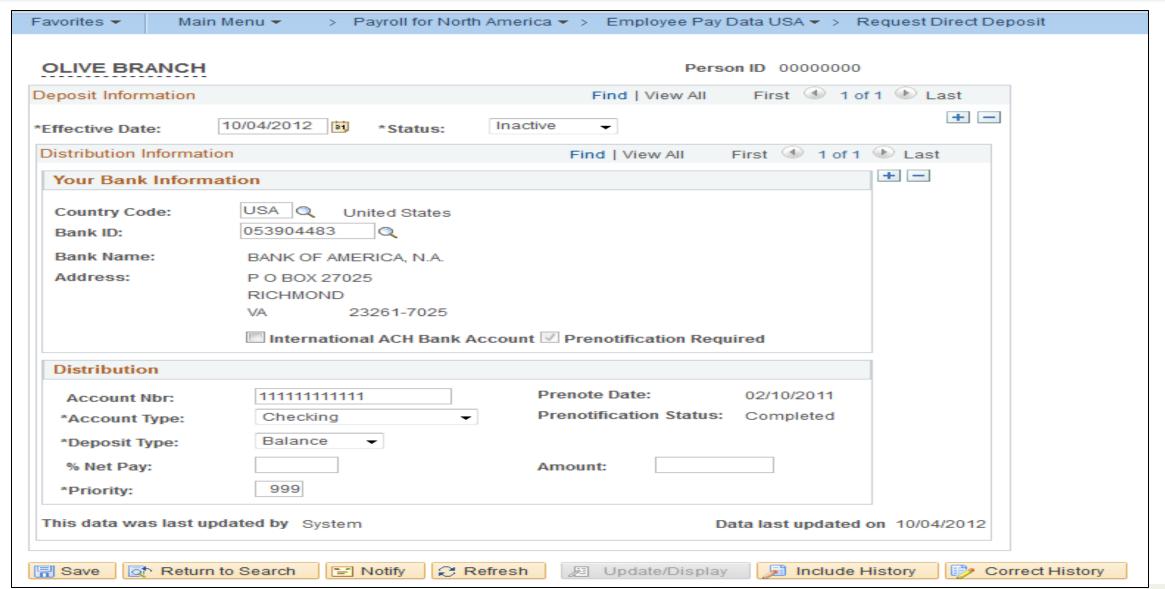
### Create Additional Pay



### Review Paycheck

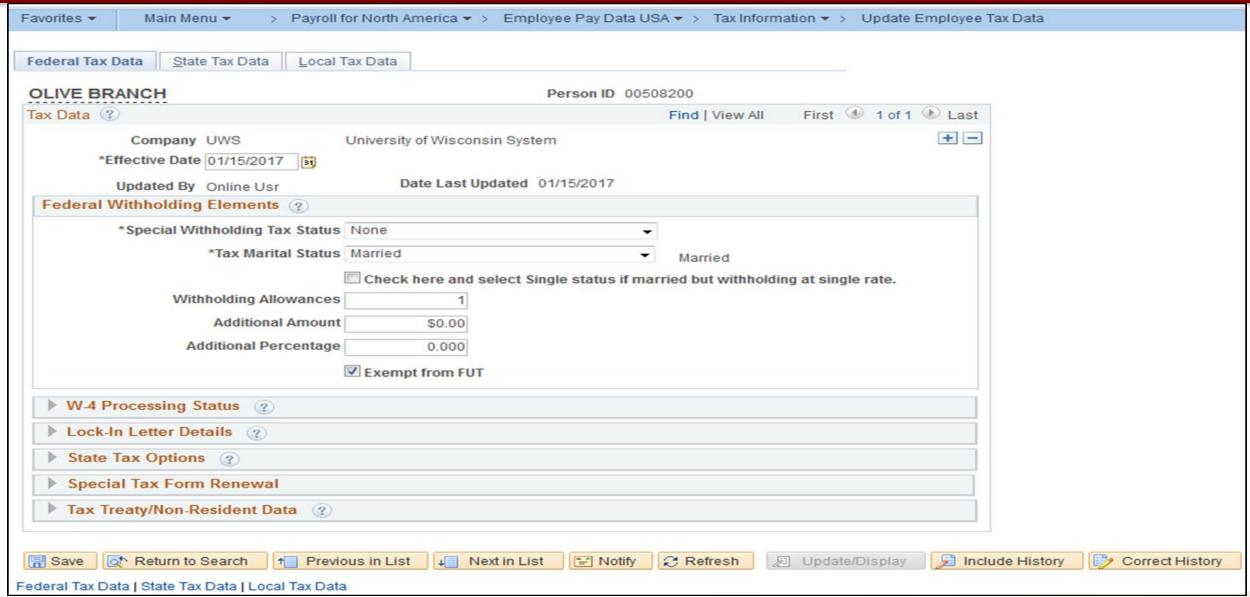


### Request Direct Deposit





### Update Employee Tax Data - Federal

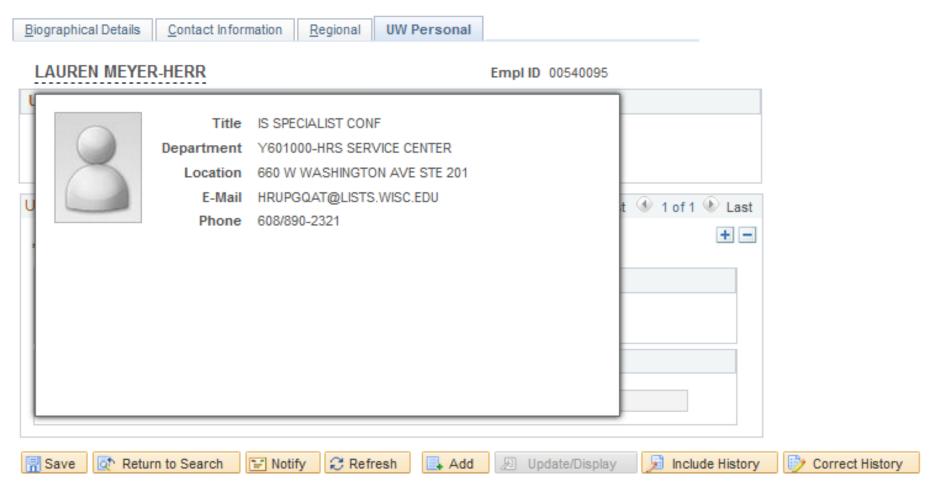


### 9.2 HRS Pages at a Glance

### Human Resources



### HR: Mouse Over Feature



Biographical Details | Contact Information | Regional | UW Personal





### Job Data: Work Location Tab

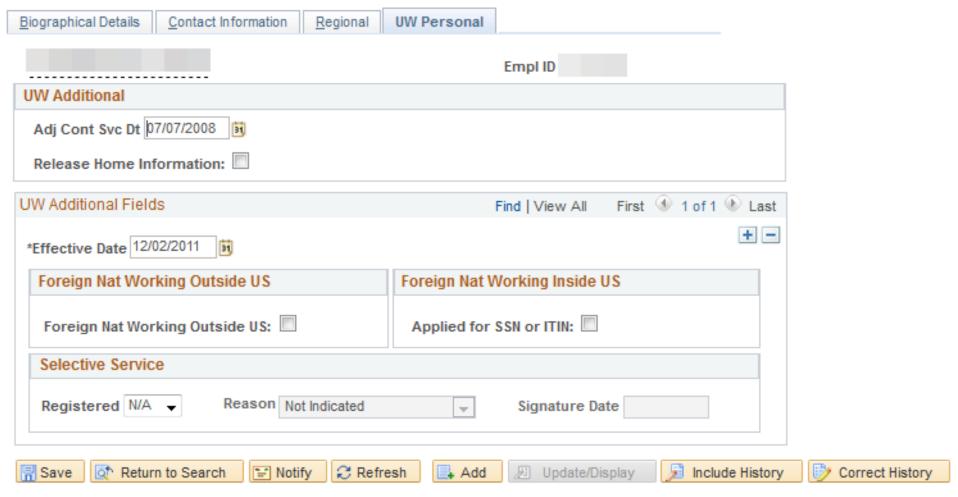
Work Location Job Information	Job <u>L</u> abor <u>P</u> ayroll	Payroll* Salary Plan Co	mpensation	UW Custom	UW Custom*	UW Benefits	UW Benefits*
JOHN DOE Employee		Empl ID 9999999 Empl Record 0	99				
Work Location ②					Find	First 🐠 1 of	2 Dast
*Effective Date	06/26/2016					Go To Row	+ -
Effective Sequence	1		*Action	Data Change			▼
HR Status	Active		*Reason	Encumbrance Date	Updates		▼
Payroll Status	Active	*Job	Indicator	Primary Job			▼
Position Number	Q	IS SPECIALIST CONF			Cu	rrent [	
	Override Position						
Position Entry Date							
r conton that y bate	Position Manageme	ent Record					
Regulatory Region	_	United States					
Company	UWS	University of Wisconsin Sy	stem				
Business Unit							
Department	Y601000 HRS SERVICE CENTER						
Department Entry Date	11/03/2014						
Location	Y8006	660 W WASHINGTON AVE	STE 201				
Establishment ID	UWSYS Q UW System Wide Date Created 06/25/2016					5/2016	
Last Start Date	02/10/2011						
Expected Job End Date	ii ii						
Job Data Emp	oloyment Data	Earnings Distribution		Benefi	ts Program Parti	cipation	
Save Return to Search	† Previous in List	Next in List Notify	€ Refresh	∠ Update/Di	splay 🤰 Ir	nclude History	

Work Location | Job Information | Job Labor | Payroll | Payroll\* | Salary Plan | Compensation | UW Custom | UW Custom\* | UW Benefits | UW Benefits\*





### Person Data: UW Personal Tab

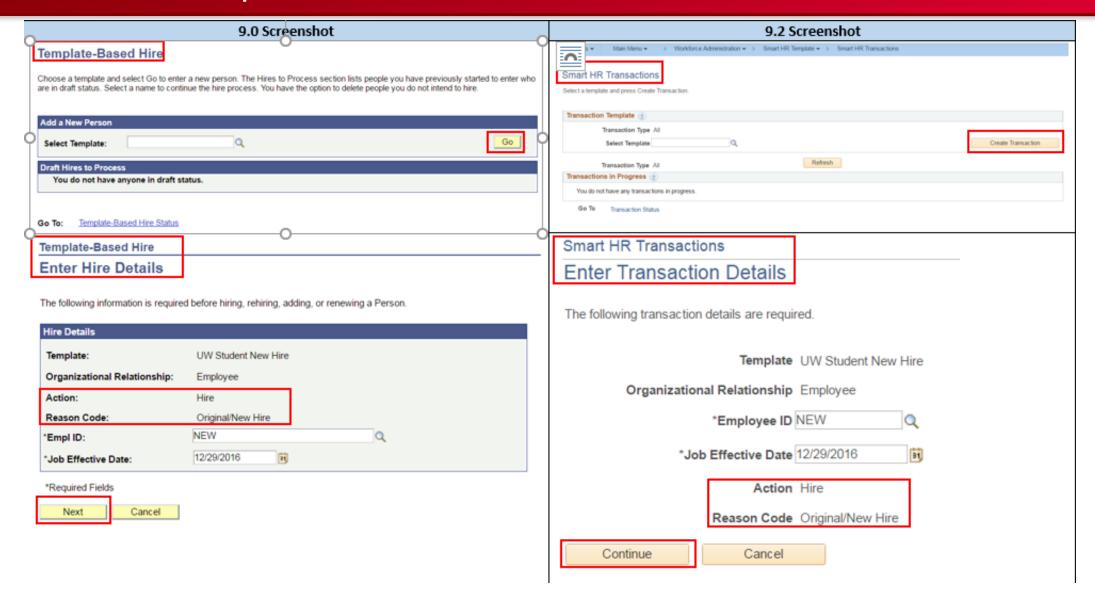








### Template-Based Hire vs Smart HR Transactions





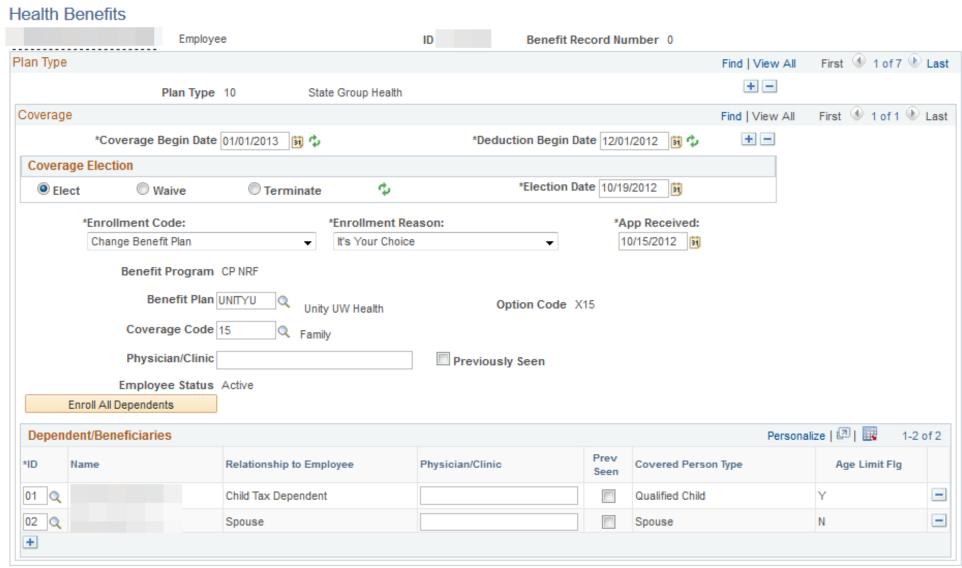


### 9.2 HRS Pages at a Glance

## BENEFITS



### Base Benefit Screen: Health Insurance







### BENEFITS: BENEFIT SUMMARY

Benefit Enrollment Summary Benefit Deduction Summary Employee Benefit Record Number 0 Primary Empl Record 0 Benefits System Benefits Administration Benefit Program C02 Univ Staff Full Time Benefits Status Active **Current Enrollments** Coverage or Plan Type Coverage Election Benefit Plan Description Coverage Begin Participation State Group Health Elect UNITYU Unity UW Family 01/01/2013 Anthem DentalBlue Dental Terminate 01/01/2012 EPIC Benefits+ Waive 01/01/2012 Waived Waive Dental Wisconsin Waived 04/10/2011 VSP Vision Insurance Waive 04/10/2011 Waived Imputed Income Terminate 01/01/2015 09/01/2011 Union Dental Terminate Elect SGL Basic State Group Life - Basic SGLBAS \$81000 04/10/2011 Elect SGLSUP State Group Life-Supplemental SGL Sup \$81000 04/10/2011 State Group Life - Additional Waive Waived 04/10/2011 State Group Life - Sp/DP & Dep Elect SGLSD2 SGL SpDP 2 \$10000 04/10/2011 Ind & Fam Life - Employee Elect IFE140 **Empl 140** \$140000 01/01/2016 01/01/2016 Ind & Fam Life - Spouse/DP Elect IFS60 Sp/DP 60 \$60000 Ind & Fam Life - Child(ren) Elect IFC25 Child 25 \$25000 11/01/2015 UW Employees Inc Life Waive Waived 04/10/2011

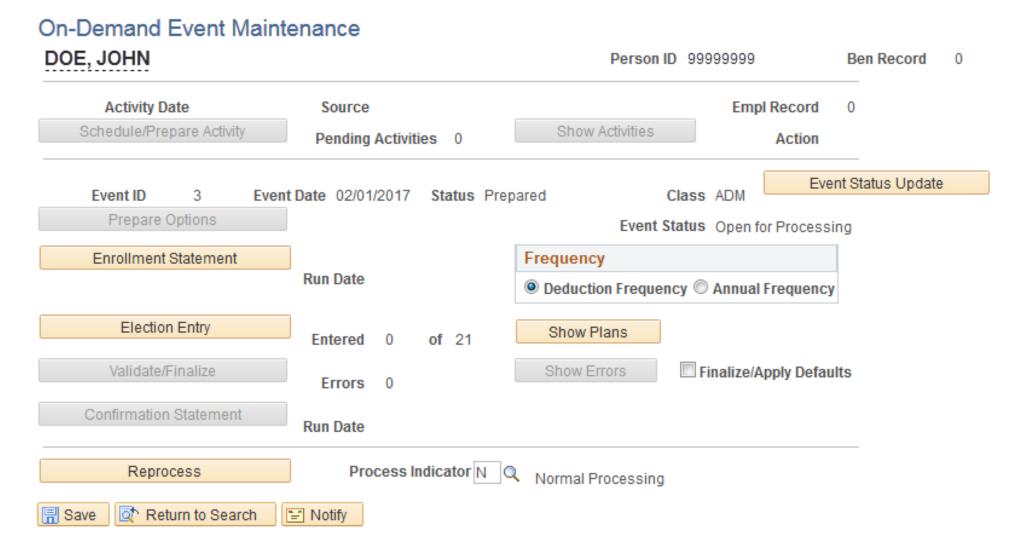
Return to Search

Benefit Enrollment Summary | Benefit Deduction Summary





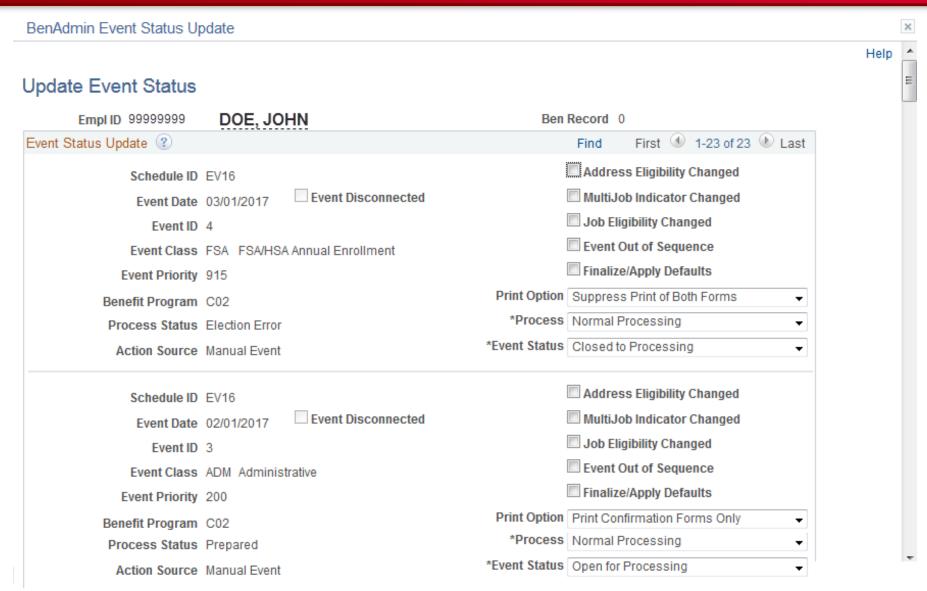
### Benefits: On Demand Event Maintenance







### Benefits: On Demand Event Maintenance







### Questions





### CYE – Important Dates

Important Ca	alendar Year-End Payroll Dates - 2016-2017 as of November 18, 2016				
Date	Event				
12/01/2016	Last on-cycle pay date in 2016 for monthly paid staff				
12/16/2016	Check Correction deadline to guarantee employees' original W-2s reflect the correct amounts				
12/22/2016	Last on-cycle pay date in 2016 for bi-weekly paid staff				
12/28/2016	NOON – Deadline for Missed Payroll submissions for inclusion on 2016 W-2s				
12/29/2016	Last off-cycle check date for 2016 (bi-weekly and monthly paid staff)				
12/30/2016	11:00AM! Deadline for Foreign National Personal Data Changes in Glacier (related to 1042-S 2016)				
01/06/2017	Final deadline for last minute Check Correction adjustments on an employee's W-2 (not guaranteed, based on volume)				
01/06/2017	Deadline for Taxable Fringe Adjustments for calendar year 2016				
01/06/2017	Deadline for Guaranteed Personal Data Changes (for ACA and W2 data)				
01/23/2017	Targeted date for finish printing W2s				
02/14/2017	Targeted print date for 2016 Fellowship/Scholarship Letters				
01/30/2017	Targeted date for employees to receive 2016 W-2s				
01/31/2017	IRS postmark deadline for employees 2016 W-2s				
02/23/2017	Targeted print date for 2016 1042-S forms - subject to change due to the HRS Upgrade				
03/01/2017	CYE posts to WISDM (approximately)				
03/10/2017	Targeted date for employees to receive 2016 1042-S forms (3/15/17 due)				



### CYE - W-2

 As you know: W-2 (Wage and Tax Statements) are Available Online in the portal

 W-2 Mailings are ahead of schedule and were expected to have gone out by last Friday, January 20, 2017

• Number mailed = 101,422



### Campus Feedback

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



### Calendar Review – January 2017

<b>G</b>	oday		January 2017		М	Ð
Sun	Mon	Tue	Wed	Thu	Fri	Sat
1 [1M] Pay Period Begin	New Year's Day (Observed)	3 [12M] Pay Date	4	[12B] Pay Date	6	7 [1A] Pay Period End
[1A] 1st Batch Prelim Calc [1B] Pay Period Begin	9 [1A] 2nd Batch Prelim Calc	10 [1A] Payroll and Benefit Retro and Payline Load [1A] 3rd Batch Prelim Calc	11 [1A] FICA Deadline [1A] 4th Batch Prelim Calc	12 [1A] Confirmation Deadline (Mor) [1A] Final Calc	13 [1M] 1st Batch Prelim Calc	14
15 [1M] 2nd Batch Prelim Calc	16 [1M] 3rd Batch Prelim Calc Martin Luther King, Jr. Day	17 [1M] Payroll and Benefit Retro and Payline Load [1M] 4th Batch Prelim Calc	18 [1M] FICA Deadline [1M] 5th Batch Prelim Calc	19 [1M] Final Calc  [1A] Pay Date  [1M] Confirmation Deadline (Eve)	20	21 [1B] Pay Period End
[2A] Pay Period Begin [1B] 1st Batch Prelim Calc [1M] Academic Year Pay Period End	[2M] Academic Year Pay Period Begin [1B] 2nd Batch Prelim Calc	24 [1B] Payroll and Benefit Retro and Payline Load [1B] 3rd Batch Prelim Calc	25 [1B] 4th Batch Prelim Calc [1B] FICA Deadline	26 [1B] Final Calc [1B] Confirmation Deadline (Eve)	27	28
29	30	31 [1M] Pay Period End	1	2	3	4



### Contact Us

Contact your Affinity Group via Telephone, Email, Web Forms our Chat

Visit our support page at <a href="https://kb.wisc.edu/hrs/page.php?id=17960">https://kb.wisc.edu/hrs/page.php?id=17960</a>

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### **AG Support phone numbers**

7:45 a.m. - 4:30 p.m 5 days a week (Mon-Fri)

AG1: (888) 298-0141 (5) (toll free) or (608) 262-0600 (5)

AG2: (888) 298-0151(toll free) or (608) 262-0419

AG3: (888) 298-4159 (toll free) or (608) 262-6093

### AG Support email addresses

7:45 a.m. - 4:30 p.m 5 days a week (Mon-Fri)

AG1: ag1@uwsa.edu

AG2: ag2@uwsa.edu

AG3: ag3@uwsa.edu

#### LiveChat & Webforms

7:45 a.m. - 4:30 p.m 5 days a week (Mon-Fri)

Click here to chat with a support agent

Use our web from to submit an incident

### Support Request - Emails

- Please include in the subject line of your email the following:
  - EE Name Employee ID/Empl Rcd Description
  - Example:
     Email Subject: Buckingham B Badger 01234567

     Rcd 0 Benefits Inquiry Description