



## Affinity Group 3

### May 23, 2017

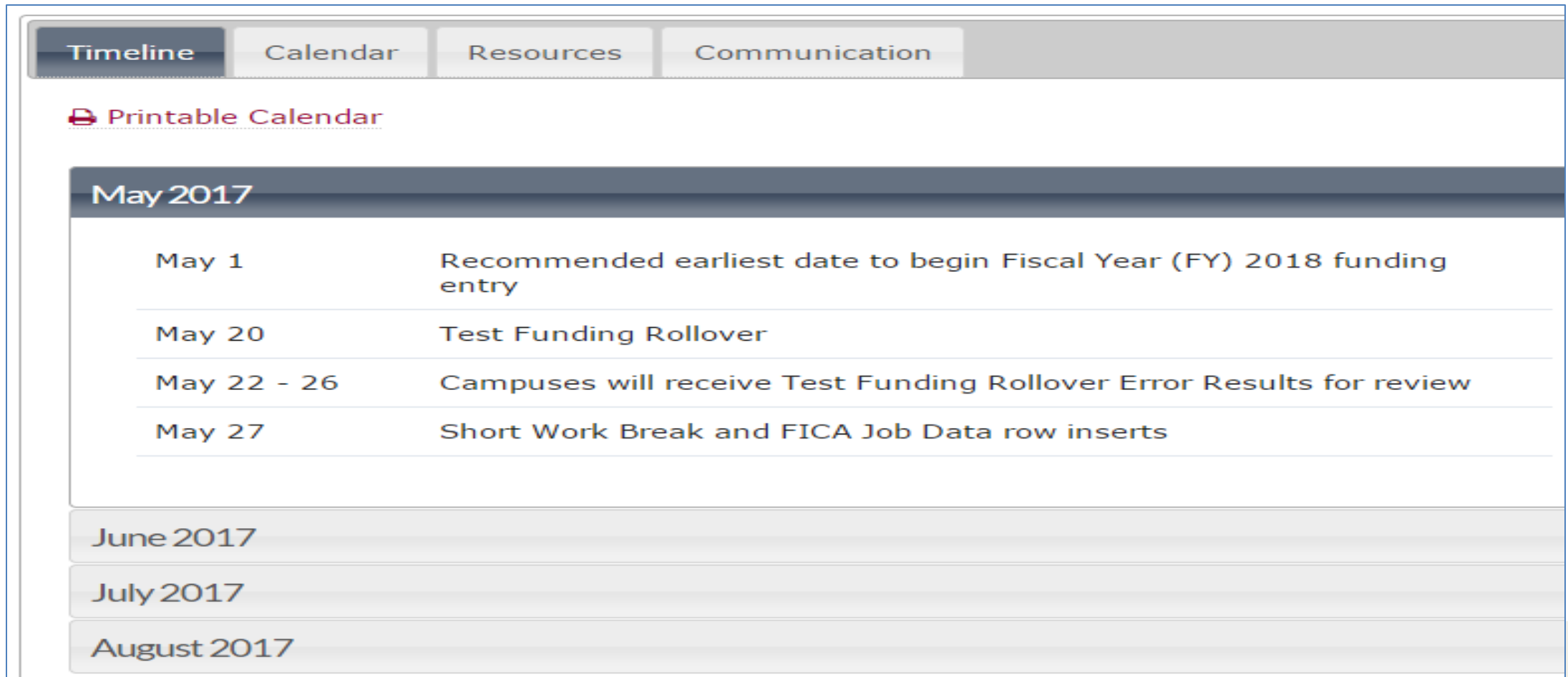
- The University of Wisconsin Service Center will*
- *Serve...the people of the University of Wisconsin System*
  - *Collaborate...by being supportive and constructive*
    - *Act with Integrity...always and in all matters*

# Agenda

- Finance:
  - Fiscal Year End (FYE)
- HR:
  - Short Work Break Process
- PeopleTools Outage
- Payroll:
  - Memorial Day Absence Load
  - Non-Standard Payroll Calc Schedule
  - May Calendar Review
- Questions/Institution Feedback

# Fiscal Year End Landing page

- Key Resource: Fiscal Year End Landing page: <https://uwservice.wisconsin.edu/administration/fye>



The screenshot displays a web interface with a navigation bar containing 'Timeline', 'Calendar', 'Resources', and 'Communication'. Below the navigation bar is a 'Printable Calendar' link. The main content area shows a timeline for May 2017 with the following events:

May 2017	
May 1	Recommended earliest date to begin Fiscal Year (FY) 2018 funding entry
May 20	Test Funding Rollover
May 22 - 26	Campuses will receive Test Funding Rollover Error Results for review
May 27	Short Work Break and FICA Job Data row inserts

Below the May 2017 section, there are buttons for 'June 2017', 'July 2017', and 'August 2017'.

# Fiscal Year End Landing page

Timeline **Calendar** Resources Communication

Printable Calendar

today May 2017 < >

Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	1 <b>Recommended earliest date to begin Fiscal Year (FY) 2018 funding entry</b>	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20 <b>Test Funding Rollover</b>
21	22 <b>Campuses will receive Test Funding Rollover Error for review</b>	23	24	25	26	27 <b>Short Work Break and FICA Job Data row inserts</b>
28	29	30	31	1	2 <b>Budget Funding Data Entry and Direct Retro page lockout to load FY 2018 funding data</b> <b>- Funding Rollover from FY 2017</b> <b>- Compensation Administration Tool to Commitment Accounting</b> <b>Deadline to correct funding to avoid Rollover Errors</b>	3
4	5 <b>Budget Funding Data Entry and Direct Retro page lockout to load FY 2018 funding data</b> <b>- Funding Rollover from FY 2017</b> <b>- Compensation Administration Tool to Commitment Accounting</b>	6	7	8	9	10 <b>FICA Job Data row insert</b>

# Fiscal Year End Landing page

Timeline   Calendar   **Resources**   Communication

## Contacts

- [Affinity Group: ag3@uwsa.edu](mailto:ag3@uwsa.edu)
- [CAT: Institutional Liasons](#)
- [CAT: Madison Liasons](#)
- [HR Contact Information](#)
- [Systemwide Business Office Directory](#)

## Reference Documents

- [FYE Funding Entry Guide](#)
- [Compensation Administration Tool](#)

## Presentation

- [Controller's Teleconference \(February 28, 2017\)](#)

## KB Documents

- [FN - Add or Change Appointment Level Funding for Employee's Salary Expense](#)
- [FN - Salary Funding Lifecycle for Payroll Processing](#)
- [FN - Salary Funding Levels Assigned During Payroll Processing](#)
- [FN - Funding Checklist and Timelines](#)
- [FN - Enter Direct Retro Funding Distribution](#)
- [FN - Resolving Funding Error Issues](#)
- [HR - CAT - Compensation Admin Tool and Additional Adjustment Pages](#)

# Fiscal Year End Landing page

Timeline Calendar Resources **Communication**

## Past Updates

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**FYI: HRS Finance – Fiscal Year End (FYE) Communications**  
Posted on May 11, 2017 1:09pm

**Action Needed: HRS HR – Fiscal Year 2018 Department Updates**  
Posted on April 28, 2017 9:58am

**FYI: HRS Finance – Fiscal Year End (FYE) Email Distribution List for FYE Communications**  
Posted on March 20, 2017 10:10am

## FYI: HRS Finance – Fiscal Year End (FYE) Communications

*Posted on May 11, 2017 1:09pm*

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**Key Resource: Fiscal Year End Landing page**

The Service Center’s [Fiscal Year End \(FYE\) Landing page](#) for FYE 2017 is now available. Navigation: [HRS Administration](#) home page > [Finance](#) page > [Fiscal Year End Landing page](#). This webpage is your resource for the latest information on HRS-related Fiscal Year End topics, such as key dates, contacts, relevant KBs and other important references.

**Communication Change for FYE 2017**

In order to ensure HRS-related FYE information is accessible to everyone who needs it and to promote reliance on the [Fiscal Year End Landing page](#) as a key resource, we will no longer send detailed instructions or reminders via email. We will be focusing our efforts on posting specific instructions

# Fiscal Year End Test Funding Rollover

- Test Funding Rollover Results emailed this week to:
  - HRS Site Leads
  - HR, Payroll and Benefit Coordinators
  - Controllers
  - FYE Email List
  - SFS Site Leads
- Only contains predicted funding rollover errors

# Fiscal Year End Test Funding Rollover

- Incorporates FY2018 funding entered directly into HRS
- Does not incorporate funding that may be loaded from CAT
- Email includes further details and instructions
- Campuses have until **4pm, Friday, June 2** to correct any issues ahead of funding rollover



# Fiscal Year End Funding Entry Guide

## ■ Key Resource: FYE Funding Entry Guide:

<https://uwservice.wisconsin.edu/docs/publications/fye-funding-entry-guide.pdf>


Fiscal Year End Funding Entry Guide							
All UW Campuses							
except <a href="#">UW-Oshkosh</a>							
Pay Run ID	Pay Basis	Pay Frequency	Pay Period Begin Date	Pay Period End Date	Funding Entry Deadline/ Final Calc Day	WISDM Journal Date	Payment Date
2017UNC07 (7M) <small>Does not cross fiscal year</small>	Annual / A-basis	Monthly	07/01/2017	07/31/2017	07/20/2017	07/20/2017	08/01/2017
2017UNC07	Summer Session S-basis	Monthly	<a href="#">See Summer 2017 Calendars</a>		07/20/2017	07/20/2017	08/01/2017
2017UNC07	Summer Service V-basis	Monthly			07/20/2017	07/20/2017	08/01/2017
2017UNC07	Academic C-basis	Monthly			07/20/2017	07/20/2017	No Payment-Funding for Fringes only
2017BW07A (7A)	Hourly H-basis	Bi-weekly	06/25/2017	07/08/2017	07/13/2017	07/13/2017	07/20/2017

Funding Data Entry guidelines:

- If employee's funding source is not changing at beginning of FY2018:
  - Only one funding row is needed before Final Calc Day
    - Will be either loaded from CAT to CA, the funding rollover, or must be manually entered
    - Effective Date should match the Pay Period Begin Date for your institution (see above) for the employee's pay period that crosses fiscal years
- If employee's funding source is changing at beginning of FY2018:
  - Two funding rows are needed before Final Calc Day
    - First row will be either loaded from CAT to CA, the funding rollover, or must be manually entered. Effective Date should match the Pay Period Begin Date for your institution (see above) for the employee's pay period that crosses fiscal years.
    - Second row with the new funding source must be manually entered with a 7/1/2017 Effective Date.

1

Revised 5/11/2017



# Questions?



# HR: Short Work (Break SBK) Process

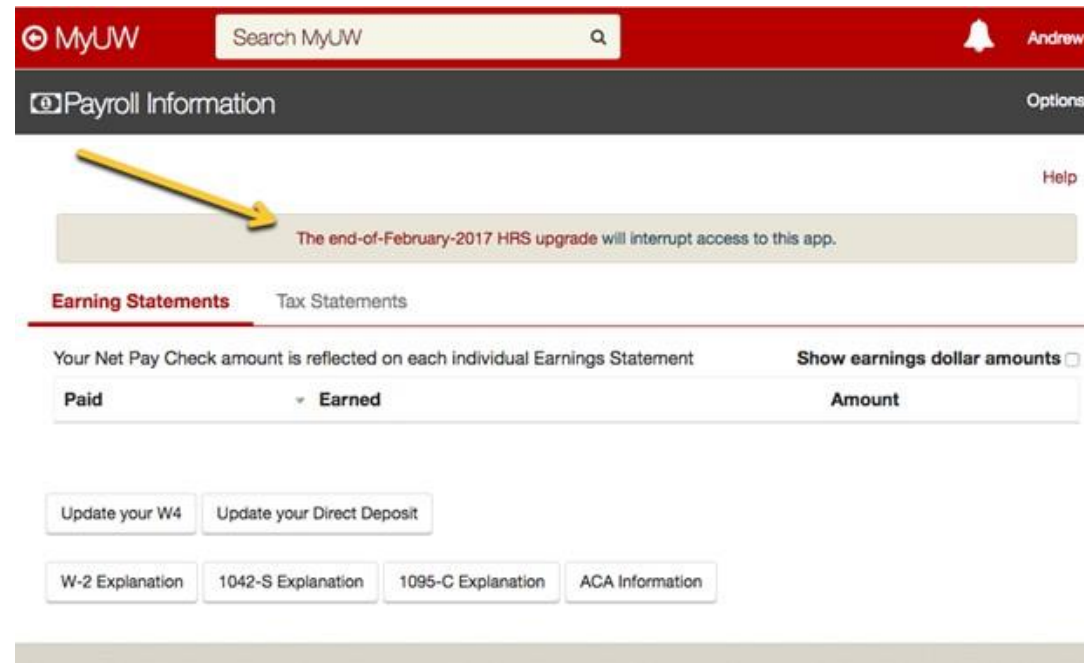
- Short Work Break (SBK) process is scheduled to run Saturday morning, 5/27/2017, after all nightly HRS Batch processing has been completed.
- All active C-basis employees will be put on a Short Work Break.

# PeopleTools Outage

- HRS Outage Begins Friday, June 2<sup>nd</sup> at 4:30 p.m. and will finish sometime Sunday evening June 4<sup>th</sup>.
- Communication Plan
  - To Administrators:
    - Reminder Emails: 5/30, 6/1 and 6/2
    - Outage in effect message: 4:30 p.m. on 6/2
    - Outage over message: Sunday, 6/4 (Exact time TBD)
- Reminder: Following maintenance the system needs to rebuild cache. Slowness can be expected.
- After any system maintenance is recommended to also clear your internet browser's cache and cookies. KB12384

# PeopleTools Outage

- Portal Messaging
  - Portal News Item
  - Starting 5/30: In-app messages (‘foreshadowing’) with link to news item:



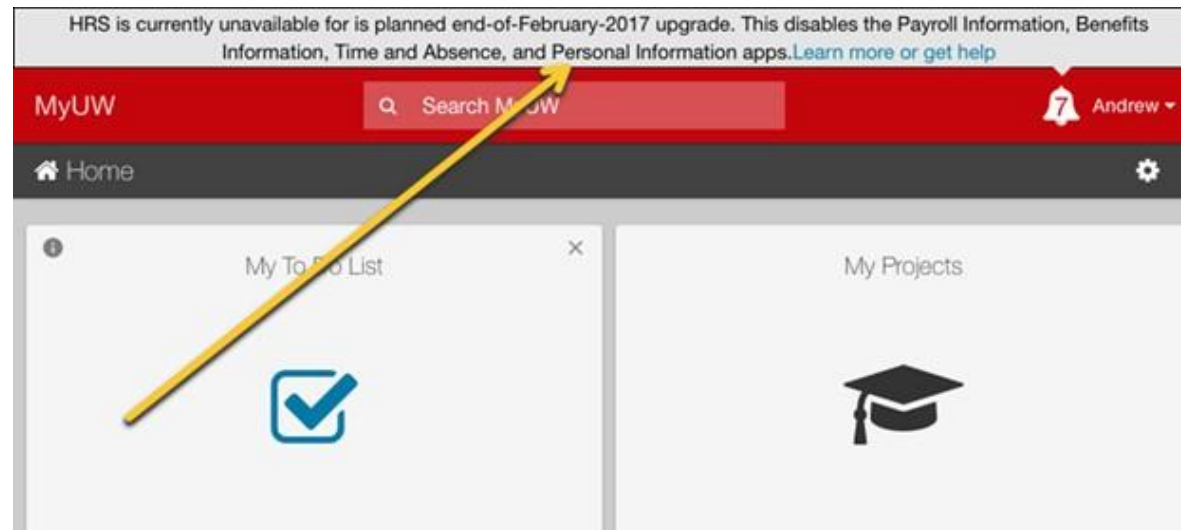
The screenshot displays the MyUW portal interface. At the top, there is a red navigation bar with the MyUW logo, a search bar, and a user profile for Andrew. Below this is a dark grey bar for 'Payroll Information' with an 'Options' dropdown. A yellow arrow points to a notification box that reads: 'The end-of-February-2017 HRS upgrade will interrupt access to this app.' Below the notification, there are tabs for 'Earning Statements' and 'Tax Statements'. The 'Earning Statements' tab is active, showing a table with columns for 'Paid', 'Earned', and 'Amount'. Below the table are buttons for 'Update your W4' and 'Update your Direct Deposit'. At the bottom, there are links for 'W-2 Explanation', '1042-S Explanation', '1095-C Explanation', and 'ACA Information'.

# PeopleTools Outage

- Portal Messaging (Continued)

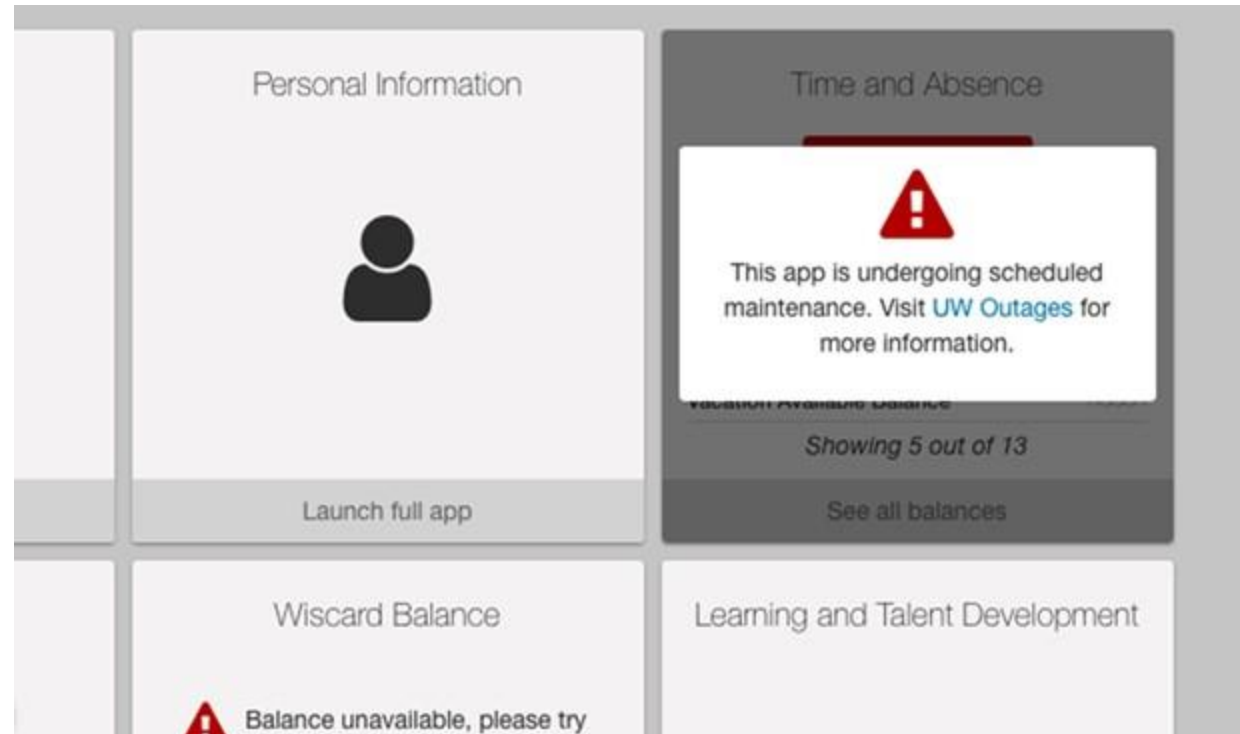
- During outage:

- Home page, top banner (priority notification during the outage) – “HRS is currently unavailable ... ”



# PeopleTools Outage

- Portal Messaging (Continued)
  - During outage:
    - Widget Message – link to outages page



# PeopleTools Outage

## Preparing your institution for the weekend outage

- Self Service Time reporting will be unavailable during this time. If you have time reporters that will need to report time over the weekend, you will want to have a plan in place for how to communicate with them regarding the outage and the process they should use for capturing their time worked (an outage notice will be posted on the MyUW portal).
- TAM will be unavailable during this time. You should be cognizant of the outage in scheduling your job openings/recruitments/closings.
- OIM will not be available during this outage, so users will not be able to make or approve access requests for HRS.
- Systems that rely on HRS messaging will not receive any messages during this time (i.e. Integration Broker messages sending Person Data from HRS to SFS)
- No batch jobs will process in HRS/EPM as usual over this weekend (i.e. no daily Time Admins, Absence Calcs, etc.)
- EPM will remain available during the outage. However, data in EPM will remain static from Friday 6/2 until approximately Tuesday 6/6.



# Questions



# PY: Memorial Day Absence Load for Hourly EEs

- Memorial Day holiday will be loaded on May 25 for 1.0 FTE employees on the biweekly payroll following the confirmation of the May 2017 unclassified payroll
- The holiday will be loaded as an absence event
- The absence event will pull into the timesheet
- There are a small number of UDDSs that will be excluded (based upon requests received)

## **2017UNC05:**

- 5/18 (Thursday) – Paysheet Create (overnight)
- 5/22 (Monday) – Payline Request Deadline (4:30 pm)
- 5/22 (Monday) – Payline & Retro Load (overnight)
- 5/23 (Tuesday) – FICA Deadline (noon)
- 5/24 (Wednesday) – Final Calc & Confirm (noon)

# PY: Calendar Review – May 2017

April 2017 June 2017

← Today →

5A 5B 5M

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

# Institution Feedback

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

# Contact Us

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

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

## AG Support phone numbers

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

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

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](mailto:ag1@uwsa.edu)

AG2: [ag2@uwsa.edu](mailto:ag2@uwsa.edu)

AG3: [ag3@uwsa.edu](mailto: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 form to submit an incident](#)

# Support Request - Emails

- **Please include the following in the subject line of your email:**

Description – EE Name – Empl Id/EmplRcd

- **Example Email Subject:**

- *W2 Inquiry - Buckingham B Badger - 01234567/0*