UW UNIVERSITY OF WISCONSIN SYSTEM
SERVICE CENTER

Affinity Group 3
June 27, 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:
    - Funding Related Changes to Payroll Edit Report
    - Funding Entry at Fiscal Year End
- AGs/Org Enablement:
    - HRS Banner
    - Summer Conference Break Out Sessions
        - LOA and Adjusted Continuous Service training needs
        - HRS Service Desk
- Benefits:
    - Wed Report Updates
- Payroll:
    - June Calendar Review
    - July Calendar Review
- Questions/Institution Feedback

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Funding Related Changes
to the Payroll Edit Report
&
Funding Entry at Fiscal Year End

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- *What*: Employee payroll data will be subtotaled differently on the Cypress version of the Payroll Edit Report.
  - Current: earnings were subtotaled by <u>Funding Source</u>
  - New: earnings will be subtotaled to match each line on Review Paycheck page

- *Why*: To accommodate crossing fiscal years and other employee changes in the middle of a pay period.

- *When*: Starting with the first Payroll Edit Report generated in Cypress on July 9 for the 7A pay period

Biweekly Payroll

Current

EmplID	Name	Empl Class	Job Code	Job Title	Empl Rcd	Position Number	Fund Dist Eff Date	Account Code	WRS	FICA	Pay Frq	Ern Code	Hours/ Amount	Pay Rate	Monthly Rate	Fund ($/%)	Funding Amount	Fund Level
		CP			0		06/26/2016	150-010500-1-1531	Y	N	H	HRG	75.50	19.600		50.000%	739.90	Appt
		CP			0		06/26/2016	150-010500-1-1531	Y	N		PSL	4.50	19.600		50.000%	44.10	Appt
															Funding Source Total:		784.00	
		CP			0		06/26/2016	150-052000-1-1531	Y	N	H	HRG	75.50	19.600		50.000%	739.90	Appt
		CP			0		06/26/2016	150-052000-1-1531	Y	N		PSL	4.50	19.600		50.000%	44.10	Appt
															Funding Source Total:		784.00	
															Empl Funding Total:		1,568.00	

5

Biweekly Payroll

New

EmplID	Name	Empl Class	Job Code	Job Title	Empl Rcd	Position Number	Fund Dist Eff Date	Account Code	WRS	FICA	Pay Frq	Ern Code	Hours/ Amount	Pay Rate	Monthly Rate	Fund ($/%)	Funding Amount	Fund Level
		CP			0		06/26/2016	150-052000-1-1531	Y	N	H	HRG	35.50	19.600		50.000%	347.90	Appt
		CP			0		06/26/2016	150-010500-1-1531	Y	N	H	HRG	35.50	19.600		50.000%	347.90	Appt
															Subtotal:		695.80	
		CP			0		06/26/2016	150-052000-1-1531	Y	N		PSL	4.50	19.600		50.000%	44.10	Appt
		CP			0		06/26/2016	150-010500-1-1531	Y	N		PSL	4.50	19.600		50.000%	44.10	Appt
															Subtotal:		88.20	
		CP			0		06/26/2016	150-052000-1-1531	Y	N	H	HRG	40.00	19.600		50.000%	392.00	Appt
		CP			0		06/26/2016	150-010500-1-1531	Y	N	H	HRG	40.00	19.600		50.000%	392.00	Appt
															Subtotal:		784.00	
															Empl Pay Period Total:		1,568.00	

Biweekly Payroll

New format aligns more closely with Review Paycheck

Monthly Payroll

Current

EmplID	Name	Empl Class	Job Code	Job Title	Empl Rcd	Position Number	Fund Dist Eff Date	Account Code	WRS	FICA	Pay Frq	Ern Code	Hours/ Amount	Pay Rate	Monthly Rate	Fund ($/%)	Funding Amount	Fund Level
		AS			0		01/13/2017	103-154600-2-1052	N	N		URP	$464.40			75.000%	348.30	Appt
		AS			0		01/13/2017	103-154600-2-1052	N	N	9M	URG	144.93	20.094	3,715.20	75.000%	2,786.40	Appt
															Funding Source Total:		3,134.70	
		AS			0		01/13/2017	136-153027-2-1052	N	N		URP	$464.40			25.000%	116.10	Appt
		AS			0		01/13/2017	136-153027-2-1052	N	N	9M	URG	144.93	20.094	3,715.20	25.000%	928.80	Appt
															Funding Source Total:		1,044.90	
															Empl Funding Total:		4,179.60	

Monthly Payroll

New

EmplID	Name	Empl Class	Job Code	Job Title	Empl Rcd	Position Number	Fund Dist Eff Date	Account Code	WRS	FICA	Pay Frq	Ern Code	Hours/ Amount	Pay Rate	Monthly Rate	Fund ($/%)	Funding Amount	Fund Level
		AS			0		01/13/2017	136-153027-2-1052	N	N	9M	URG	9.06	20.094	3,715.20	25.000%	928.80	Appt
		AS			0		01/13/2017	103-154600-2-1052	N	N	9M	URG	81.52	20.094	3,715.20	75.000%	2,786.40	Appt
															Subtotal:		3,715.20	
		AS			0		01/13/2017	136-153027-2-1052	N	N		URP	$ 116.10			25.000%	116.10	Appt
		AS			0		01/13/2017	103-154600-2-1052	N	N		URP	$ 348.30			75.000%	348.30	Appt
															Subtotal:		464.40	
														Empl Pay Period Total:			4,179.60	

Monthly Payroll

New format aligns more closely with Review Paycheck

Payroll Edit Report

- Reminder:
  - An Excel format of the Payroll Edit Report can be run any time after a preliminary payroll calc.

    Navigation: Reporting Tools > Query > Query Viewer > UW_PY_EDIT_BY_JOB_DEPT

  ▶ Export to Excel for sorting and analysis as desired.

- Security Role required: *PY Query View or PY Payroll View*

- How To: https://kb.wisc.edu/hrs/page.php?id=19809

For the 7A and 7M pay periods…

- Salary and Fringe funding will only come from **Fiscal Year 2018** entries on the Budget Funding Data Entry page in HRS.
  - Fiscal Year 2017 entries will be ignored, even for the portion of the pay period that is in June.
- Ensure Effective Date of FY 2018 appointment level funding matches the first day of the employee's pay period that crosses fiscal years.
  - For example, a continuing biweekly employee paid on the 7A must have FY18 appointment level funding with an Effective Date of 6/26/2017.
  - If the Effective Date is July 1, the June portion of the pay period will go to Suspense.

Resources

- HRS Fiscal Year End Landing page: https://uwservice.wisconsin.edu/administration/fye

  - Timeline/Calendar
  - Funding Entry Guide
  - Relevant KBs & Tip Sheets
  - Past FYE Email Communications

Questions

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- Updated to UW System red
- The remainder of the screens will be unchanged
- New banner will be moved to HRS on July 2
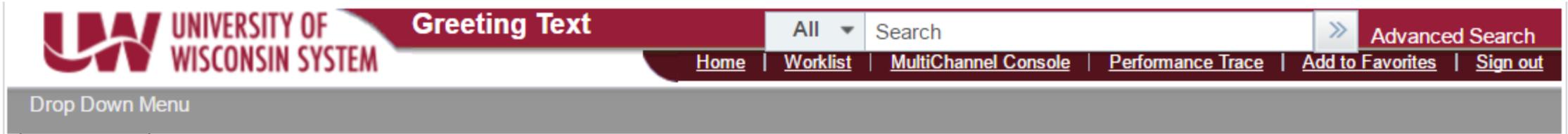
Building the Best

Summer HR, PY & BN Conference

August 2nd and 3rd in Oshkosh
Break Out Sessions

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- Adjusted Continuous Service Date – Breakout Session
  - Define ACSD
  - Why is ACSD required?
  - How is the date identified or calculated? (prior service)
  - BAS Project Team strategy for updating currently missing dates
  - Handout
  - Link to documents on HRS Project Readiness Page
  - WED Report
  - Who updates this information at your institution?

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- LOA entry will be required
  - When should a LOA be entered?
  - Paid leave
  - Unpaid leave
  - Intermittent Leave
  - Link to documents on HRS Project Readiness Page
  - Who updates this information at your institution?
  - Service Center will host a workshop on LOA on (date)

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- Open drop in session format
- Service Center staff available for walk-ins throughout the day
- Topics you would like us to be available to address?

WED Report Updates
Coming July 3rd!

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- **What Does This WED Report Do?**
  - This error report lists all employees with an open ADM, FSA, or SAV Event or employees with an open Event in a Prepare - Error Status. The ADM, FSA, or SAV Event should be Finalized or Voided if not needed.

Update:
  - This WED report currently pulls in the future dated events that cannot be worked.

  - Effective July 3rd, this WED report will display current effective event dates only. (future dated events will not be identified in advanced)

- **Resource: KB 16486**

- What Does This WED Report Do?
  - FA/AS/LI employees who are covered by the WRS can elect to enroll in Early ICI. When they have 12 months of WRS state service, they need to be enrolled in the Regular ICI plan. This WED report identifies FA/AS/LI employees who have an active enrollment in <u>both</u> the Early and the Regular Income Continuation Insurance and need to have their Early coverage waived.

Update:
  - This WED report currently pulls in the future dated events that should not be worked in advance.

  - Effective July 3[rd,] since these future events do not need to be identified so far in advanced, this WED report will display one month beyond current effective date.

- What Does This WED Report Do?
  - FA/AS/LI employees who are covered by the WRS can elect to enroll in Early ICI. When they have 12 months of WRS state service, they need to be enrolled in the Regular ICI plan. This WED report identifies employees who need their Early ICI coverage waived and enrolled into Regular ICI coverage when the employee has reach 12 months of WRS state service.

- Update:
  - This WED report currently pulls in future dated events that should not be worked in advance.

  - Effective July 3rd, since these future events do not need to be identified so far in advanced, this WED report will display one month beyond current effective date.

  - Resource: KB 20826

- What Does This WED Report Do?
  - Notifies that the benefit primary flag logic has assigned one of the active jobs as the benefits primary.

- Update:
  – The benefit primary flag logic that has been put into place is highly accurate at assigning the correct empl rcd for benefits.
  – Propose removing this WED report
  – Concerns?

- New Name!
  - ~~UW_BN_ARREARS_BAL~~ to UW_BN_REVIEW_ARREARS
- Path: Reporting Tools – Query – Query Viewer
- Query Updated to Display New Information:
  - Displays Employee Name
  - Displays Employee HR and Payroll Status
- Resource: KB 34240

Questions

June 2017

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

27

July 2017

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

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

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
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

- **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*