



Affinity Group 3

May 15, 2018

- 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

- AM/TL: Integrated Punch Timesheet Update
- BN: Summer Prepay
- HR: Short Work Break Process
UW_HR_MISSING_HOME_ADDRESS WED
- FN: Direct Retro for Inactive Pay Groups
- Security: HRS Security Awareness Reminder
- PD: Upcoming Training
- PY: Calendar Review
Institutional Feedback

Integrated Punch Timesheet Update

- Background:
 - Originated from institution feedback
 - Previously shared with PY/BN User Group and HR Directors
- Reminder of key features:
 - Integrate Absence Management functionality
 - New alert icons and warnings
 - Columns reordered, renamed, condensed (i.e. +/- button)
 - Create 'Copy from previous period' button

Original Campus Requests/Feedback Incorporated

1. Remove/hide unused columns or information
2. Merging of TL/AM Modules
3. Allow Absence entry from the timesheet
4. Enhance slow scrolling
5. Rename/reorder current fields
6. Incorporate Absence warning messages (i.e. not enough balance to cover)
7. Reported time and payable time status indicators
8. Ability to select and delete multiple rows
9. Intuitive delete absence capabilities
10. Ability to copy hours from one week to the next

Additional Feedback Received from User Group Call

1. Rename the columns used in recording time in and time out
2. Move the Comp Time column to main page
3. Change view from week by week to a 2-week view

Punch Hourly Integrated Timesheet Preview

Updated Draft

Employee Name: _____ Employee ID: 00000001 Earliest Change Date: 01/01/2018
 Job Title: _____ Empl Record: 0

Select Another Timesheet
 *View By: [Previous Period](#) [Next Period](#)
[Previous Empl/Job](#) [Next Empl/Job](#)
 *Date:

Scheduled Hours: 80.00 Reported Hours: 75.50

From Sunday 02/04/2018 to Saturday 02/17/2018

Main Fields Additional Elements All Fields Main Fields

	Alert	SHIFT IN	BREAK OUT	BREAK IN	SHIFT OUT	Punch Total	Time Reporting Code	Quantity	Scheduled Hours	Comp Time
<input type="checkbox"/> Sun 02/04						--			0.00	
<input type="checkbox"/> Mon 02/05		08:15:00a	11:45:00a	12:15:00p	04:45:00p	8.00			8.00	
<input type="checkbox"/> Tue 02/06		08:15:00a	11:45:00a	12:15:00p	04:45:00p	8.00			8.00	
<input type="checkbox"/> Wed 02/07		08:15:00a	11:45:00a	12:15:00p	04:45:00p	8.00			8.00	
<input type="checkbox"/> Thu 02/08						--	VACTN - Vacation	8.00	8.00	
<input type="checkbox"/> Fri 02/09		08:00:00a			12:00:00p	4.00			8.00	
<input type="checkbox"/> Fri 02/09						--	SCKLV - Sick Leave	4.00	8.00	
<input type="checkbox"/> Sat 02/10						--			0.00	
<input type="checkbox"/> Sun 02/11						--			0.00	
<input type="checkbox"/> Mon 02/12		08:15:00a	11:45:00a	12:15:00p	04:45:00p	8.00			8.00	
<input type="checkbox"/> Tue 02/13		08:15:00a	11:45:00a	12:15:00p	04:45:00p	8.00			8.00	
<input type="checkbox"/> Wed 02/14		08:15:00a	11:45:00a	12:15:00p	04:45:00p	8.00			8.00	
<input type="checkbox"/> Thu 02/15		08:15:00a	11:45:00a			3.50			8.00	
<input type="checkbox"/> Fri 02/16						--	VACTN - Vacation	8.00	8.00	
<input type="checkbox"/> Sat 02/17						--			0.00	

Payable Time (Default) Compensatory Time Absence Balances (Current Focus) Exceptions

Absence Entitlement Balances				
Entitlement Name	Balance as of 02/04/2018	From	To	Accrual Period
Personal Holiday Balance	33.75	01/01/2018	12/31/2018	Year to Date
Vacation Allocation Balance	216.00	01/01/2018	12/31/2018	Year to Date
Vacation Available	216.00	01/01/2018	12/31/2018	Calendar Period
Legal Holiday Balance	56.00	01/01/2018	12/31/2018	Year to Date
Sick Leave Balance	1573.30	01/01/2018	12/31/2018	Year to Date

Punch Hourly Integrated Timesheet Full Page Preview

Updated Draft—Design still in Progress

Employee Name _____ Employee ID 00000001 Earliest Change Date 01/01/2018
 Job Title _____ Empl Record 0

Select Another Timesheet

*View By [Previous Period](#) [Next Period](#)
[Previous Empl/Job](#) [Next Empl/Job](#)
 *Date

Scheduled Hours 80.00 Reported Hours 75.50

From Sunday 02/04/2018 to Saturday 02/17/2018

Main Fields Additional Elements All Fields

Main Fields										Additional Elements				
	Alert	SHIFT IN	BREAK OUT	BREAK IN	SHIFT OUT	Punch Total	Time Reporting Code	Quantity	Scheduled Hours	Comp Time	*Task Group	Task Profile ID	TCD ID	Lunch Deduct
<input type="checkbox"/> (+) (-) ☰	Sun	02/04					--		0.00		UW_DEFAULT			
<input type="checkbox"/> (+) (-) ☰	Mon	02/05	08:15:00a	11:45:00a	12:15:00p	04:45:00p	8.00		8.00		UW_DEFAULT			
<input type="checkbox"/> (+) (-) ☰	Tue	02/06	08:15:00a	11:45:00a	12:15:00p	04:45:00p	8.00		8.00		UW_DEFAULT			
<input type="checkbox"/> (+) (-) ☰	Wed	02/07	08:15:00a	11:45:00a	12:15:00p	04:45:00p	8.00		8.00		UW_DEFAULT			
<input type="checkbox"/> (+) (-) ☰	Thu	02/08					--	VACTN - Vacation	8.00	8.00	UW_DEFAULT			
<input type="checkbox"/> (+) (-) ☰	Fri	02/09	08:00:00a			12:00:00p	4.00		8.00		UW_DEFAULT			
<input type="checkbox"/> (+) (-) ☰	Fri	02/09					--	SCKLV - Sick Leave	4.00	8.00	UW_DEFAULT			
<input type="checkbox"/> (+) (-) ☰	Sat	02/10					--		0.00		UW_DEFAULT			
<input type="checkbox"/> (+) (-) ☰	Sun	02/11					--		0.00		UW_DEFAULT			
<input type="checkbox"/> (+) (-) ☰	Mon	02/12	08:15:00a	11:45:00a	12:15:00p	04:45:00p	8.00		8.00		UW_DEFAULT			
<input type="checkbox"/> (+) (-) ☰	Tue	02/13	08:15:00a	11:45:00a	12:15:00p	04:45:00p	8.00		8.00		UW_DEFAULT			
<input type="checkbox"/> (+) (-) ☰	Wed	02/14	08:15:00a	11:45:00a	12:15:00p	04:45:00p	8.00		8.00		UW_DEFAULT			
<input type="checkbox"/> (+) (-) ☰	Thu	02/15	08:15:00a	11:45:00a			3.50		8.00		UW_DEFAULT			
<input type="checkbox"/> (+) (-) ☰	Fri	02/16					--	VACTN - Vacation	8.00	8.00	UW_DEFAULT			
<input type="checkbox"/> (+) (-) ☰	Sat	02/17					--		0.00		UW_DEFAULT			

Copy From Previous Week

Submit

Delete Selected Rows

Payable Time (Default) Compensatory Time Absence Balances (Current Focus) Exceptions

Absence Entitlement Balances

Entitlement Name	Balance as of 02/04/2018	From	To	Accrual Period
Personal Holiday Balance	33.75	01/01/2018	12/31/2018	Year to Date
Vacation Allocation Balance	216.00	01/01/2018	12/31/2018	Year to Date
Vacation Available	216.00	01/01/2018	12/31/2018	Calendar Period
Legal Holiday Balance	56.00	01/01/2018	12/31/2018	Year to Date
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Punch Hourly Integrated Timesheet Full Page Preview

Draft—Design in Progress

- Complete design, enhancements and training plan will be communicated as rollout approaches
- Rollout targeted for this summer. Will keep you updated on project timeline
- Are Institutions using the portal help pages to train new employees/managers on how to use timesheets or do you use separate training materials?
 - If you have separate training materials, please send copies of materials to your AG lead.
- Send feedback on the timesheet to AGs

Questions?



Summer Prepay

Summer Prepay Policy provides guidelines for maintaining benefits eligibility over the summer

- Summer Prepay Policy:
<https://www.wisconsin.edu/ohrwd/download/policies/ops/gen30.pdf>

HR Impacts on Summer Prepay

- In order to maintain benefits, the employee's C-Basis (Academic Year) Empl Record:
 - Must have active HR Status throughout the payroll being processed
 - Must be on a Short Work Break (SBK) during the summer
 - Must be the benefit primary for the various prepay processes
 - Insurances must be active for prepays to disburse
- Job Terminations
 - All insurances terminate at the end of that month

HR Impacts on Summer Prepay

- Incorrect Job Data could result in:
- Benefits terminating
 - COBRA notification sent
 - Refunds Issued
- Denial of Services
- Arrears, Benefits Billing, Missed Earnings, etc.
 - Incorrect Employee Subsidies via Marketplace

Summer Prepay Identification

- Remember, the UW is considered one employer
 - Consider:
 - Department Transfers
 - Institution Transfers
 - Employees transferring should be put on a Short Work Break and NOT terminated if they are returning in the Fall to a different institution or department.

Summer Termination

- Timely notification for employee that has no expectation to return in the fall (at any UW Institution) **and/or** will not work a summer appointment: termination date should be end of the spring appointment.
- If employee terminates during summer period with no expectation to return in the fall and has summer employment, termination date should be end of the summer appointment.
- If employee terminates during summer period with no expectation to return in the fall, and does not have summer employment, termination date should be effective the day after resignation was received. Do NOT retroactively term employment back to end of academic year.

Late Notifications of Fall Appointment Scenarios

- Spring Employment Terminated and late notification of Fall Hire \leq 30 Days
 - Considered Termed in Error
 - Extend EJED in HRS to end of summer or appropriate end date
 - Put employee on short work break
 - Reinstate Benefits
- Spring Employment Terminated and late notification of Fall Hire $>$ 30 days
 - Considered a valid break in employment
 - Benefit eligibility would be re-evaluated upon Fall appointment start date and new applications are required.

WRS-Eligible Fall Appointment

- WRS/Benefit eligibility begin the first day of summer appointment.
- Must enroll in benefits within the thirty days of the summer appointment start date if eligible, or would lose enrollment opportunities

Summer Prepay

- **Summer Prepay Resource Landing Page:**
<https://uwservice.wisconsin.edu/administration/prepay/>
- Summer Prepays – Scenarios PowerPoint
- Calendar & Timeline with Key Dates
- KBs – Queries for managing Summer Prepay
- Supporting Job Aids
- Policy
- Summer Prepay Slides

Questions?



Short Work Break (SWB) Process

- Short Work Break (SBK) process is scheduled to run Saturday morning, 5/26/2018, after all nightly HRS Batch processing has been completed.
- All active C-basis employees will be put on a Short Work Break.

UW_HR_MISSING_HOME_ADDRESS REMINDER

- A Home or Mailing Address Type is needed in HRS for payroll purposes
 - W-2's
 - Paper Checks
- Additional address types can be entered in HRS, but these do not replace the need for a Home or Mailing type
 - Apartment/Dormitory
 - Permanent
 - Billing
- The UW_HR_MISSING_HOME_ADDRESS WED report identifies all active employees with a missing address who should be updated by institutions
- ([KB-30553](#))HR-WED-UW_HR_MISSING_HOME_ADDRESSES

Questions?



FN: Direct Retros for Inactive Pay Groups

In February 2017, Pay Groups ending in a number were deactivated and are no longer used. E.g., AR9, CA5, HL8, etc.

- The last day to process Direct Retros *on these inactive Pay Groups* is **June 21, 2018**. After this date, HRS will not allow submission of DRs for these Pay Groups and journal entries must be made in SFS.

See [KB 29890](#), Pay Group Descriptions, for a complete list of all active and inactive Pay Groups in HRS.

FN: Direct Retros for Inactive Pay Groups

Error message when attempting to change Distribution Status to “Ready for Batch Processing” status:

The screenshot displays a web application interface for managing pay groups. At the top, there is a "New Data" section with tabs for "Earnings" and "Posting Accounting Period". Below this is a table with columns: Empl Record, Earn Code, Department, Position, Job Code, Job Title, GL Bus Unit, Fund, Dept ID, Program, and Project. The table contains one row of data for a Graduate Assistant.

Empl Record	Earn Code	Department	Position	Job Code	Job Title	GL Bus Unit	Fund	Dept ID	Program	Project
0	URU	K805800	02161456	Y44NN	GRADUATE ASSISTANT	UWSTP	102	805800	2	

Below the table, there is a "Calculate Distribution" button and a "Requester Comments" text area. At the bottom, there is a "Distribution Status" dropdown menu currently set to "Ready for Batch Processing". A red circle highlights this dropdown, and a green arrow points from it to an error message dialog box.

The error message dialog box contains the following text:

Message

Errors Exist, Please Review

The PeopleCode program executed an Error statement, which has produced this message.

OK

FN: Direct Retros for Inactive Pay Groups

If user clicks OK and reviews the Messages tabs, the following error will display:

The screenshot displays a software interface with several components:

- Earnings Messages Tab:** Located at the top left, circled in red. It shows a status of "Editing", created on 05/11/2018, and a date of pay of 08/25/2018. A table below lists employee details for Employee ID 78366, Page 133, and Line 1. The "Distribution Details" link is circled in red.
- Earnings Retro Messages Window:** A modal window titled "Earnings Retro Messages" is open. It contains the following information:
 - Run Control ID: DR00000174240
 - Status: Editing
 - Created By: 004
 - Created: 05/11/2018
 - Transaction Type: Direct
 - Date of Pay: 08/25/2018
 - Company: UWS University of Wisconsin System
 - Pay Group: AR9 (circled in red) A-Basis Study/Train
 - Pay End Date: 02/28/2017
 - Separate Check: Off Cycle
 - Page: 133
 - Empl Record: 0
 - Earnings Code: URU
- Message Details:** Below the retro message information, the "Message" section shows:
 - Application: HP_DIRRET DST
 - Message Number: 524
 - Message: Unable to obtain Pay End Date or Accounting Period for Pay Date
 - Description: Program was unable to find the pay end date from Pay Calendar where GL Interface not run (date not exceeding pay date on run control) or Accounting Period associated with the Pay Date.
- Message Details Tab:** At the bottom of the interface, the "Message Details" link is circled in red.

FN: Direct Retros for Inactive Pay Groups

Delete the Direct Retro and initiate a journal entry in SFS.

To properly delete the DR, click Delete, OK, and then Delete, OK again.

Retro Distribute Earnings Retro Distribute Deduction Retro Distribute Taxes Earnings Messages Deduction Messages Tax Messages

Retro Distribution Transaction

Run Control ID DR00000174240 Created By [redacted] Created 05/11/2018
Transaction Type Direct Date of Pay 08/25/2018
Status In Process

Check Earnings Line

Empl ID: 008 [redacted] M. [redacted]
Company: UWS Pay Group: AR9 Pay Begin Date: 02/01/2017 Pay End Date: 02/28/2017
Pay Run 2017UNC02 2017 Unclassified February Off Cycle ? Posting Pay End Date

Message

You are about to delete this direct retro transaction. Click OK to continue... (9000,52)

OK Cancel

FN: Direct Retros for Inactive Pay Groups

Process Direct Retro Distribution

Direct Retro ID: DR00000174240
Last Updated By: 00 [redacted]
Set ID: SHARE
Bus Unit: UW Stevens Point

Processing Option
Apply to Transactions: All

Search for Next Payroll
Pay Period End Date: 08/25/2018 2018UNC08
Days Prior Pay End Date: 28 Ignore Off Cycle:

2 **Process Monitor** **Delete**

Message

You are about to delete this direct retro transaction. Click OK to continue... (9000,52)

OK Cancel

Questions?



HRS Security Awareness Reminder

- One week remains for core users of HRS and EPM to complete the annual Security Awareness Course
- Core users can find the course on their Learning Path
- Weekly completion status reports have been sent to HRS Approvers
- Core users not successfully completing the course by the end of day on May 22, will have their accounts locked until training is completed

PD: Upcoming Learning Path Courses

- Finance –
 - Setting Up Funding
 - June 4 – PM (remote)
 - Changing Funding (prerequisite – Setting Up Funding)
 - June 5 – PM (remote)
 - Direct Retro (remote)
 - June 7 – AM (remote)

PY: Calendar Review

← Today →

5A 5B 5M

May 2018

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

Questions?



Institutional Feedback

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