



## Affinity Group 2

### August 7, 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

- BN: ABE 2019 IYC Kick-Off  
Rehired Annuitant Form  
ACA Processing Date Change
- HR: Vacant Position Report
- PY: Salary Advance Request  
US Bank Focus Card
- AM: Monthly LH Load  
FA/AS/LI Pending Absence Approvals
- PD: Upcoming Training  
Calendar Review  
Institutional Feedback

# ABE 2019 IYC Kick-Off and UW Training

## ABE 2019: IYC Kick-Off

- The Department of Employee Trust Funds (ETF) will host the IYC kick-off on **Wednesday, September 19, 2018** (Alliant Energy Center, Madison).

*For those traveling to Madison for the kick-off that would like a conference room to work in the afternoon of the kick-off, there will be one available at the UW Service Center (660 W. Washington Street, Madison).*

## ABE 2019: UW Training

- UW System HR and UW System Service Center will host the Training for administrators on **Thursday, September 20, 2018** (UW Service Center: 660 W. Washington Street, Madison).

*Both the IYC Kick-Off and the UW Training are available to attend in person or remotely.*

# Rehired Annuitant Form

- Version of Rehired Annuitant Form
  - ETF has reported receiving outdated Rehired Annuitant Forms (ET-2319).
  - Please make sure you are using the most current form: [ET-2319 Rehired Annuitant Form](http://etf.wi.gov/publications/et2319.pdf) (<http://etf.wi.gov/publications/et2319.pdf>)
- Returning Completed Forms
  - ET-2319 requires a signature from a WRS agent.
    - ETF is receiving forms signed by human resource representatives and forms that are not signed by a WRS agent.
  - Please have employees submit completed Rehired Annuitant Forms to human resources office within 7 days of returning to work. The forms should then be faxed to the Service Center at 608-890-2194 for review and signature. The Service Center will then submit to ETF.
  - Resource – [Rehired Annuitant Checklist](#)

# ACA Processing Date Change

- August ACA Processing has been rescheduled from August 11 to August 18, 2018
- ACA Reports generated by this process will not be available until after August 18

# Questions?



# Vacant Positions Report

- When running the Vacant Positions Report, users will now receive an excel (as well as PDF) output file when they run the report in PDF format.

Organizational Development > Position Management > Position Reports > Vacant Position Report

Process Scheduler Request

Help

User ID 00840852

Run Control ID VAC\_POS\_RPT

Server Name

Run Date

Recurrence

Run Time

Reset to Current Date/Time

Time Zone

### Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Vacant Position	UWHRR016	SQR Report	Web	PDF	Distribution

### File List

Name	File Size (bytes)	Datetime Created
SQR_UWHRR016_3551647.log	1,735	07/26/2018 8:23:46.619656AM CDT
VacantPosition.xls	2,772	07/26/2018 8:23:46.619656AM CDT
uwhrr016_3551647.PDF	4,806	07/26/2018 8:23:46.619656AM CDT
uwhrr016_3551647.out	440	07/26/2018 8:23:46.619656AM CDT

# Vacant Position Report

- The following missing headers were added to the PDF report (and match the excel headers):
  - Department Description
  - Job Code Description

Position	Department	Department Description	JobCode	JobCode Description	Empl Class	Full/ Part	Position Status	Position Date	Contin- uity	Pay Basis	FTE	Salary Plan	Salary Grade	Max Head	Number of Incumbents Count
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# Questions?



# Salary Advance Request (MSN)

- Salary Advances can only be requested for brand new FA/AS/LI employees and cannot exceed 35% of monthly gross salary
- Requests for 2018 salary advances are due Friday, August 24, 2018
- Resulting off-cycle payments created by the UWSC will be dated September 5, 2018
- If ACH is not established, a paper check will be mailed to the address in HRS
- The employee must complete the Salary Advance Request and Payroll Deduction Form  
(<https://www.wisconsin.edu/financial-administration/forms-and-publications/#salary>)
- Salary Advance form is to be kept at the Division Office for your records

# Salary Advance Request (MSN)

- Methods available to request salary advance:
  - Complete spreadsheet and send to [ag1@uwsa.edu](mailto:ag1@uwsa.edu) with “Salary Advance 2018” in subject line (template attached)
  - Complete the request form located at:  
<https://uwservice.wisc.edu/administration/salary-advance/>  
This option will be routed directly to the UWSC and a Wiscit will be created
- Policy reference: UW System Administrative Policy 230, IV.F
- <https://www.wisconsin.edu/financial-administration/financial-administrative-policies-procedures/fppp/f29-rev-2-salary-and-fringe-benefits-calculations-for-unclassified-staff/>

# Salary Advance Request (Non-MSN)

- Options for processing Salary Advance Requests:
  - Use Campus Contingent Fund to issue the salary advance payment with an off-setting Accounts Receivable to be taken on the September payroll
  - Submit a request to the UW Service Center for an off-cycle payment for the salary advance which will include a negative gross adjustment to be taken on the September payroll (negative gross will be entered by UWSC)
- Methods available to submit MPR (second option above):
  - Complete spreadsheet and email to your AG with “Salary Advance 2018” in subject line (template attached)
  - Complete the request form located at:  
<https://uwservice.wisc.edu/administration/salary-advance/>  
This option will be routed directly to the UWSC and a wiscit will be created
- Salary Advances can only be requested for brand new FA/AS/LI employees and cannot exceed 35% of monthly gross salary

# Salary Advance Request (Non-MSN)

- If you choose to use the off-cycle payment (MPR) to request a salary advance:
  - Requests for 2018 salary advances are due Friday, August 24, 2018
  - Resulting off-cycle payments created by the UW SC will be dated September 5, 2018
- If ACH is not established, a paper check will be mailed to the address in HRS
- The employee must complete the Salary Advance Request and Payroll Deduction Form  
(<https://www.wisconsin.edu/financial-administration/forms-and-publications/#salary>)
- Salary Advance Request forms are to be kept at the Institution for your records
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# Questions?



# US Bank Focus Card

## U.S. BANK FOCUS CARD™ Frequently Asked Questions



### What is the Focus Card?







The Focus Card is a reloadable, prepaid debit card issued by U.S. Bank. It provides an electronic option for receiving your pay. It is not a credit card, but works similarly to other debit cards.

### How does the Focus Card work?

Once funds are added to the card account, it can be used to make purchases, pay bills, and make online, phone or mail-order purchases. You can also get cash back with purchases at participating merchants or withdraw cash at ATMs, banks or credit unions. The amounts of purchases, bill payments or cash withdrawals are automatically deducted from the available balance on the card.

# US Bank Focus Card

## Advantages of having a Focus Card:

 	<b>Fast</b> – Your money is automatically deposited to your card account		<b>Save Money</b> – No more going to the check casher
	<b>Save Time</b> – Easy and quick access to your funds without waiting in line to cash or deposit a check		<b>Track Spending</b> – Account information and customer service 24 hours a day
	<b>Convenient</b> – Make purchases anywhere debit cards are accepted, including retail stores, grocery stores, restaurants and pharmacies and withdraw cash at ATMs		<b>Extensive Benefits</b> – Enjoy the prestige and purchase protection given to Visa®/MasterCard®-branded cardholders, without a credit check!
	<b>Secure</b> – No need to carry large amounts of cash		<b>Reliable</b> – Receive your money on time. No more lost or stolen checks
			<b>Safe</b> – Funds are FDIC insured and are protected by Visa/MasterCard Zero Liability <sup>2</sup>



# US Bank Focus Card Alerts

Alert Type	Description	Sample Text Alert	Sample Email Alert
<b>Welcome</b>	When you have successfully enrolled in Alerts.	Welcome to U.S. Bank card alerts. The frequency of alerts is determined by user selection. Standard message charges apply. Quit? Txt STOP Help? Txt HELP.	<p><b>Welcome to Email Alerts!</b> You have successfully enrolled in U.S. Bank Focus Card Alerts. The frequency of email alerts you receive depends on the alerts you set when you enrolled.</p> <p>To change your alert settings, log onto the cardholder website at <a href="http://www.usbankfocus.com">www.usbankfocus.com</a>.</p>
<b>Low Balance Alert</b>	When your available balance on the card falls below a set minimum.	Your U.S. Bank card balance is <b>\$77.01</b> , which is below the <b>\$100.00</b> threshold you established. Quit? Txt STOP. Help? Txt HELP.	<p><b>Low Balance Alert</b> Your U.S. Bank Focus Card balance is \$77.01, which is below the \$100.00 threshold you established.</p> <p>To change your alert settings, log onto the cardholder website at <a href="http://www.usbankfocus.com">www.usbankfocus.com</a>.</p>
<b>Load Alert</b>	When funds are loaded to the card – includes your new available balance.	On 11/8/13, <b>\$50.00</b> was loaded onto your U.S. Bank card. Your available balance is now <b>\$81.56</b> . Quit? Txt STOP. Help? Txt HELP.	<p><b>Money Loaded Alert</b> On 11/08/2013, \$50.00 was loaded onto your U.S. Bank Focus Card. As of 11/08/2013, your available balance was \$81.56.</p> <p>To change your alert settings, log onto the cardholder website at <a href="http://www.usbankfocus.com">www.usbankfocus.com</a>.</p>
<b>POS Pre-Authorization Alert</b>	When each point-of-sale (POS) pre-authorization transaction is posted to your card account – includes your new available balance.	Your U.S. Bank card has been authorized by Walgreens in the amount of <b>\$50.00</b> . Your new available bal is <b>\$100.00</b> . Quit? Txt STOP. Help? Txt HELP.	<p><b>POS Pre-Authorization Alert</b> Walgreens has authorized a hold in the amount of \$50.00 on your U.S. Bank Focus Card. The authorized amount will not be available for other purchases and will be held until the transaction posts to your card. As of 11/1/2013, your available balance was \$100.00.</p> <p>To change your alert settings, log onto the cardholder website at <a href="http://www.usbankfocus.com">www.usbankfocus.com</a>.</p>

# US Bank Focus Card Alerts cont'd

Alert Type	Description	Sample Text Alert	Sample Email Alert
<b>Purchase Decline Alert</b>	When your card is declined – includes your new available balance and any applicable fees.	A trans for <b>\$50.00</b> from your U.S. Bank card was declined. Your new available Bal is <b>\$30.00</b> . Quit? Txt STOP. Help? Txt HELP.	<p><b>Decline Alert</b></p> <p>A transaction for \$50.00 from your U.S. Bank Focus Card was declined. As of 11/1/2013, your available balance was \$30.00.</p> <p>To change your alert settings, log onto the cardholder website at <a href="http://www.usbankfocus.com">www.usbankfocus.com</a>.</p>
<b>Purchase Alert</b>	When you make a point-of-sale (POS) transaction – includes your new available balance.	A purchase for \$-1.98 from <b>2570 COUN</b> has been posted to your U.S. Bank card. Your new available bal is <b>\$77.01</b> . Quit? Txt STOP. Help? Txt HELP.	<p><b>Purchase Alert</b></p> <p>A purchase for \$-1.98 from 990961110 WAL-MART #5820 2570 COUNTRY RD 00 MIDDLEBURG FL US has been posted to your U.S. Bank Focus Card. As of 11/11/2013, your available balance was \$77.01.</p> <p>To change your alert settings, log onto the cardholder website at <a href="http://www.usbankfocus.com">www.usbankfocus.com</a>.</p>
<b>Card Shipped</b>	When your card has been shipped.	Your U.S. Bank card has been shipped. You should receive it in 7-10 business days unless you ordered expedited shipping. Quit? Text STOP Help? Text HELP.	<p><b>Card Shipped Alert</b></p> <p>Congratulations! Your U.S. Bank Focus Card has been shipped. You should receive it in 7-10 business days unless you ordered expedited shipping. To learn about the features of your card, visit <a href="http://www.usbankfocus.com">www.usbankfocus.com</a>.</p> <p>To change your alert settings, log onto the cardholder website at <a href="http://www.usbankfocus.com">www.usbankfocus.com</a>.</p>

# US Bank Focus Card Facts

- Focus MasterCard will have a 3 year expiration date
- Allows employer to load & reload payroll payments directly to employee's card on pay date
- Cards will be mailed directly to employee's HOME address in HRS (will not mail to foreign address)
- Employee will need to register their card before it can be used
- Employee will need CVV and DOB to activate card



# US Bank Focus Card Facts cont'd

Focus MasterCard can be used worldwide

- to pay bills on line
- for point of sale purchases
- for cash advance via ATM or in brick & mortar bank facilities
- Balance can be withdrawn with no fee at US Bank ATM or Money Pass ATM
- Money Pass ATMs include Kwik Trip, Associated Bank, and several local banks
- <https://www.moneypass.com/atm-locator.html>

# US Bank Focus Card Facts cont'd

- Employees will work directly with US Bank to:
  - Update home address
  - Request replacement for lost or stolen cards  
(no fee for one replacement card in a 12 month cycle)
- US Bank contact online or via phone
- Goals of using US Bank Focus Card:
  - Reduces paper check issuance
  - Avoids check cashing fees
  - Assures access to payment on pay day
- Target Go Live:
  - 9M/9B Payrolls for existing non-ACH employees
  - October for newly hired employees

# Questions?



# Monthly Legal Holiday Load

- Based on your feedback, effective with the 7/4 Holiday use load, LH use will load for FA/AS/LI employees on a paid leave of absence
- If the holiday is loaded and should not be processed as a take, it can be voided
- Voiding the take will not reduce the LH accrual
- If the LH accrual should be reduced due to ineligibility, a Wiscit will continue to be required

# FA/AS/LI Absence Pending Approvals

- To identify FA/AS/LI submitted absence takes that are pending approval, please run the `UW_AM_ABS_NOT_APPRVD_FAASLI` query
- Pending approvals will cause SL Reduction in October if not approved
- The Sick Leave Reduction Report can be run to identify those currently flagged for reduction (KB-41996)



# Questions?



# Upcoming Learning Path Courses - Finance

- **Setting Up Funding (remote)**
  - Sept 12 – AM
  - Nov 6 - AM
- **Changing Funding (remote)**
  - Sept 13 – AM
  - Nov 7 - AM
- **Direct Retro (remote)**
  - Nov 8 - AM

# Upcoming Learning Path Courses – BN & HR

- Benefits classes – at the Service Center
  - WRS Eligibility – Aug 29
  - Benefit Eligibility and New Hire Hold – Aug 29
  - Event Maintenance – Aug 30
  - Enrollments – Sept 11
  - Deductions – Sept 11
- HR classes – at the Service Center
  - Introduction to Hiring – Aug 14
  - Updates: Person, Position, Job – Aug 14
  - Rehires, Transfers, Multiple Jobs – Aug 15

# PY Calendar Review

← Today →

August 2018

8A 8B 8M

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