



## Affinity Group 3

### September 4, 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

- PUM: Upgrade Updates
  - BN: UIA Life Insurance Annual Deduction
  - TAM: New Applicant Disposition
  - PY: Non-Standard Processing Schedule
- Communities of Practice
- Upcoming Training
- Calendar Review
- Institutional Feedback

# HRS Field Changes

There are a number of HRS pages that will have field changes updated on September 9.

These changes are occurring due to program changes:

- To make current fields more intuitive
- To discontinue fields not currently used

# Absence Management: Absence Event Page

**Changes:** Forecast Messages tab, Forecast button and bottom navigation will be removed from the Absence Event page

The screenshot displays the 'Absence Event Entry' interface. At the top, there are navigation tabs: 'Absence Event Entry' and 'Forecast Messages' (highlighted with a red box). Below the tabs, there are input fields for 'Employee ID' (000...), 'Empl Record' (0), and 'Name'. There are also date pickers for 'From' (06/08/2017) and 'Through' (11/04/2018), along with 'Refresh' and 'Forecast' buttons (the latter is highlighted with a red box).

The main section is titled 'Absence Events' and contains a table with the following columns: 'Absence Take', 'Description', 'Begin Date', 'End Date', 'Partial Hours', and 'Process Action'. The table lists several absence events, each with a search icon and a dropdown arrow.

*Absence Take	Description	*Begin Date	End Date	Partial Hours	*Process Action
UWS U VN TAKE	Vacation (UNC)	05/29/2018	06/01/2018	8.00	Normal
UWS U LH TAKE	Legal Holiday (UNC)	05/28/2018	05/28/2018	8.00	Normal
UWS U PH TAKE	Personal Holiday (UNC)	05/02/2018	05/02/2018	8.00	Normal
UWS U PH TAKE	Personal Holiday (UNC)	04/16/2018	04/16/2018	8.00	Normal
UWS U PH TAKE	Personal Holiday (UNC)	03/30/2018	03/30/2018	8.00	Normal
UWS U SL TAKE	Sick Leave (UNC)	03/28/2018	03/28/2018	4.00	Normal
UWS U PH TAKE	Personal Holiday (UNC)	03/02/2018	03/02/2018	8.00	Normal
UWS U PH TAKE	Personal Holiday (UNC)	02/02/2018	02/02/2018	4.00	Normal
UWS U LH TAKE	Legal Holiday (UNC)	01/15/2018	01/15/2018	8.00	Normal
UWS U NOTAKE TAKE	No Leave Taken (UNC)	01/01/2018	01/01/2018		Normal

At the bottom of the page, there are buttons for 'Save', 'Return to Search', 'Notify', and 'Refresh'. A breadcrumb trail at the very bottom reads 'Absence Event Entry | Forecast Messages' (highlighted with a red box).

# Absence Management: Absence Event Page

## Future State

The screenshot displays the 'Absence Event' page in a web application. At the top, there is a breadcrumb trail: 'Global Payroll & Absence Mgmt > Payee Data > Maintain Absences > Absence Event'. Below this, the 'Absence Event Entry' section contains search filters: 'Employee ID' (06), 'Empl Record' (0), 'Name' (with a red box around the input field), 'From' (08/28/2017), and 'Through' (01/24/2019). A 'Refresh' button is located below the date filters. The main content area is titled 'Absence Events' and features a table with the following columns: \*Absence Take, Description, \*Begin Date, End Date, Partial Hours, \*Process Action, Voided, Original Begin Date, Details, Entry Source, and Workflow Status. The table lists several absence events, including Vacation (CLS), Convert Vac to Banked Lv (CLS), Legal Holiday (CLS), and Sick Leave (CLS), with their respective dates and statuses.

*Absence Take	Description	*Begin Date	End Date	Partial Hours	*Process Action	Voided	Original Begin Date	Details	Entry Source	Workflow Status
UWS C VN TAKE	Vacation (CLS)	11/24/2017	11/24/2017	8.00	Normal	<input type="checkbox"/>	11/24/2017	Details	Employee Absence Request	Approved
UWS C VNCVSB TAKE	Convert Vac to Banked Lv (CLS)	12/02/2017	12/02/2017		Normal	<input type="checkbox"/>	12/02/2017	Details	Employee Absence Request	Approved
UWS C VN TAKE	Vacation (CLS)	11/22/2017	11/22/2017	8.00	Normal	<input type="checkbox"/>	11/22/2017	Details	Employee Absence Request	Approved
UWS C LH TAKE	Legal Holiday (CLS)	11/23/2017	11/23/2017	8.00	Normal	<input type="checkbox"/>	11/23/2017	Details	Third Party	Approved
UWS C LH TAKE	Legal Holiday (CLS)	12/25/2017	12/25/2017	8.00	Normal	<input type="checkbox"/>	12/25/2017	Details	Third Party	Approved
UWS C VN TAKE	Vacation (CLS)	12/29/2017	12/29/2017	8.00	Normal	<input type="checkbox"/>	12/29/2017	Details	Employee Absence Request	Approved
UWS C SL TAKE	Sick Leave (CLS)	12/19/2017	12/19/2017	8.00	Normal	<input type="checkbox"/>	12/19/2017	Details	Employee Absence Request	Approved
UWS C VN TAKE	Vacation (CLS)	12/22/2017	12/22/2017	8.00	Normal	<input type="checkbox"/>	12/22/2017	Details	Employee Absence Request	Approved
UWS C VN TAKE	Vacation (CLS)	10/06/2017	10/06/2017	8.00	Normal	<input type="checkbox"/>	10/06/2017	Details	Employee Absence Request	Approved
UWS C SL TAKE	Sick Leave (CLS)	10/12/2017	10/12/2017	4.00	Normal	<input type="checkbox"/>	10/12/2017	Details	Employee Absence Request	Approved

# Absence Management: Absence Balance Page

**Changes:** Forecast Messages tab and Forecast Messages link will be removed from the Absence Balance Page

The screenshot displays the 'Absence Balance' page interface. At the top, there are three tabs: 'Current Balance', 'Forecast Balance', and 'Forecast Messages' (highlighted with a red box). Below the tabs, there are search fields for 'Employee ID', 'Empl Record', and 'Name'. The main content area is titled 'Absence Entitlement Current Balance' and includes a 'Personalize' link, a 'Find' button, a 'View All' link, and pagination controls showing '1-10 of 21' items. Below this is an 'Accumulator Balance' section with a 'User Keys' button. The central part of the page is a table with the following data:

Accumulator Period	Entitlement Element	Element Name	Amount	From	Through
Year to Date	UWS_C_FTO	UWS_C_FTO_BAL	0.000000	07/01/2017	06/30/2018
Year to Date	UWS_U_ALRA	UWS_U_ALRA_BAL	0.000000	07/01/2017	06/30/2018
Year to Date	UWS_U_ALRACT	UWS_U_ALRACT_BAL	7.000000	07/01/2017	06/30/2018
Year to Date	UWS_U_CAT	UWS_U_CAT_BAL	0.000000	07/01/2017	06/30/2018
Year to Date	UWS_U_DONATE	UWS_U_DONATE_BAL	0.000000	07/01/2017	06/30/2018
Year to Date	UWS_U_FMLA	UWS_U_FMLA_BAL	0.000000	07/01/2017	06/30/2018
Year to Date	UWS_U_LH	UWS_U_LH_BAL	12.000000	07/01/2017	06/30/2018
Year to Date	UWS_U_LHA	UWS_U_LHA_BAL	12.000000	07/01/2017	06/30/2018
Year to Date	UWS_U_NORPT	UWS_U_NORPT_BAL	0.000000	07/01/2017	06/30/2018
Year to Date	UWS_U_NOTAKE	UWS_U_NOTAKE_BAL	-1.000000	07/01/2017	06/30/2018

At the bottom of the page, there are three buttons: 'Return to Search', 'Notify', and 'Refresh'. Below these buttons, there are three tabs: 'Current Balance', 'Forecast Balance', and 'Forecast Messages' (highlighted with a red box).

# Absence Management: Absence Balance Page

## Future State

Favorites ▾ Main Menu ▾ Global Payroll & Absence Mgmt ▾ Payee Data ▾ Maintain Absences ▾ Review Absence Balances

Current Balance Forecast Balance

Employee ID 00 Empl Record 0 Name \_\_\_\_\_

**Absence Entitlement Current Balance** Personalize | Find | View All | First 1-10 of 29 Last

Accumulator Balance User Keys

Accumulator Period	Entitlement Element	Element Name	Amount	From	Through
Year to Date	UWS_C_CAT	UWS_C_CAT_BAL	0.000000	01/01/2018	12/31/2018
Year to Date	UWS_C_CT	UWS_C_CT_BAL	0.000000	01/01/2018	12/31/2018
Year to Date	UWS_C_DONATE	UWS_C_DONATE_BAL	0.000000	01/01/2018	12/31/2018
Year to Date	UWS_C FMLA	UWS_C FMLA_BAL	0.000000	01/01/2018	12/31/2018
Year to Date	UWS_C_FTO	UWS_C_FTO_BAL	0.000000	07/01/2017	06/30/2018
Year to Date	UWS_C_LH	UWS_C_LH_BAL	0.000000	01/01/2018	12/31/2018
Year to Date	UWS_U_ALRA	UWS_U_ALRA_BAL	0.000000	07/01/2017	06/30/2018
Year to Date	UWS_C_LHA	UWS_C_LHA_BAL	56.000000	01/01/2018	12/31/2018
Year to Date	UWS_C_PH	UWS_C_PH_BAL	28.000000	01/01/2018	12/31/2018
Year to Date	UWS_C_SAB	UWS_C_SAB_BAL	480.000000	01/01/2018	12/31/2018

Return to Search Notify Refresh

Current Balance | Forecast Balance

# Benefits: Member Beneficiary Identifier (MBI) Update and Request

- Centers for Medicare Services (CMS) generated new Medicare Beneficiary Identifiers (MBI) for ALL Beneficiaries. **CMS began issuing new, redesigned Medicare cards containing the NEW MBI on April 1, 2018.**
- Medicare information is provided on the SGH application and is stored in HRS:
  - Benefits > Employee/Dependent Information > Benefits Personal Data
- **As of September 9, 2018**, if an employee provides you with an MBI, please:
  1. Enter Medicare Beneficiary ID's (MBI's) into HRS into the Alternate Medicare Number field for employees only
  2. The Medicare Number field will be grayed out (no longer editable)
  3. Do not update any dependent MBI numbers
  4. Please contact UW SC via your affinity group with the employee and dependent information so they can get ETF updated with the new number



# Benefits: MBI Update and Request

## Future State

Benefits Personal Data

Person ID: [REDACTED]

ETF Member ID: [REDACTED]

**Coordination of Benefits**

My spouse/domestic partner is also a State of WI employee:

\*Other Health Insurance: No

Insurance Company Name: [REDACTED]

Other Insurance Policy Number: [REDACTED]

Other Insurance Group Number: [REDACTED]

**Marital Status** Find | View All First 1 of 1 Last

As of: 08/11/1990 \*Marital Status: Married

**Benefits Personal Data**

Highly Compensated Employee

\*Highly Compensated Last Year: Not Eligible for the Plan

**Benefits Personal Data - Date Sensitive** Find | View All First 1 of 1 Last

Effective Date: 08/07/2016

Medicare Number: 123456

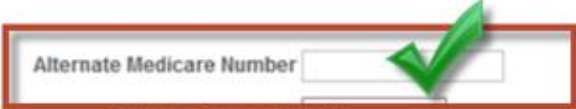

Medicare A Indicator:

Medicare B Indicator:

Alternate Medicare Number: [REDACTED]

Medicare Reason A: Age

Medicare Reason B: Age



# Benefits Billing: Adjust Charges Page

**Future State:** Adding "EE" (employee) in front of the following fields: Charge, Charge Adjustments, Payment, Payment Adjustments and Net

Adjust Charges

Person ID

Charge Adjustments

Billing Period	1805	05/01/2018 to	05/31/2018	Empl Record	0
Plan Type	2N	State Group Life-Supplemental		COBRA Event ID	
EE Charge	1.68	EE Charge Adjustments	0.00		
EE Payment	1.68	EE Payment Adjustments	0.00	EE Net	0.00
ER Charge	0.63	ER Charge Adjustments	0.00	ER Net	0.63

Adjustment Details

Posting Date	Action Type	Charge Amount	Charge Adjustments	ER Charge Amt	ER Charge Adj	Payment Amount	Payment Adjustments
04/17/2018	Charge			0.63			
05/31/2018	Charge	1.68					
05/31/2018	Payment					1.68	

EE Charge Adjustment

Post Date: 08/22/2018  
Adjustment Description:   
Post Seq: 1  
Adj Amt:

ER Charge Adjustment

Post Date: 08/22/2018  
Adjustment Description:   
Post Seq: 1  
Adj Amt:

Save Return to Search Previous in List Next in List Notify

# Benefits: Health Benefits, Life, Savings and Disability Pages

**Change:** Removing the Benefit Program field from Health Benefits, Life, Savings and Disability pages

The screenshot shows the 'Health Benefits' enrollment page. The breadcrumb trail is: Favorites > Main Menu > Benefits > Enroll in Benefits > Health Benefits. The page title is 'Health Benefits'. Below the title, there are fields for 'Employee ID' and 'Benefit Record Number 0'. The 'Plan Type' section shows 'Plan Type 10' and 'State Group Health'. The 'Coverage' section includes 'Coverage Begin Date' (03/17/2012) and 'Deduction Begin Date' (03/01/2012). The 'Coverage Election' section has radio buttons for 'Elect', 'Waive', and 'Terminate', with 'Elect' selected. The 'Election Date' is 03/26/2012. The 'Enrollment Code' is 'Birth' and the 'Enrollment Reason' is 'Birth'. The 'App Received' date is 03/18/2012. The 'Benefit Program' field is highlighted with a red box and contains the value 'CP NRF'. Other fields include 'Benefit Plan' (Dean Health Plan), 'Option Code' (E15), 'Coverage Code' (15), and 'Health Provider ID'. The 'Employee Status' is 'Active'. There is an 'Enroll All Dependents' button. The 'Dependent/Beneficiaries' table has one entry: ID 01, Name (blank), Relationship to Employee (blank), Health Provider ID (blank), Prev Seen (checkbox), Covered Person Type (Qualified Child), and Age Limit Flg (Y). At the bottom, there are buttons for 'Save', 'Return to Search', 'Notify', 'Refresh', 'Update/Display', 'Include History', and 'Correct History'.

## Future State

Health Benefits

Employee ID: \_\_\_\_\_ Benefit Record Number: 0

Plan Type: Plan Type 10 State Group Health

Coverage: \*Coverage Begin Date 03/17/2012 \*Deduction Begin Date 03/01/2012

Coverage Election:  Elect  Waive  Terminate \*Election Date 03/26/2012

\*Enrollment Code: Birth \*Enrollment Reason: Birth \*App Received: 03/18/2012

Benefit Plan: DEAN (highlighted in red)

Coverage Code: 15 Family Option Code: E15

Health Provider ID: \_\_\_\_\_ Previously Seen:

Employee Status: Active

Enroll All Dependents

*ID	Name	Relationship to Employee	Health Provider ID	Prev Seen	Covered Person Type	Age Limit Flg
01				<input type="checkbox"/>	Qualified Child	Y

Buttons: Save, Return to Search, Notify, Refresh, Update/Display, Include History, Correct History

**Note:** If Benefit Program is needed, it can still be found on Job Data.

# Payroll: Create General Deductions Page

**Change:** Removing Loan Interest % field

Person ID

Company UWS University of Wisconsin System

**General Deduction** Find | View All First 1 of 7 Last

\*Deduction Code CHAR10 SECC Dane County

**Deduction Details** Find | View All First 1 of 1 Last

\*Effective Date 12/14/2014

\*Calculation Routine Flat Amount

Deduction End Date 12/12/2015

**Loan Interest %**

Goal Amount \$104.00

Take on all Paygroups

Ded stopped by Self Serv User

Deduction Rate or %

Flat/Addl Amount \$4.00

Current Goal Balance \$104.00

This data was last updated by System

Data last updated on 12/16/2015

# Payroll: Create General Deductions Page

## Future State

Person ID

Company UWS University of Wisconsin System

General Deduction Find | View All First 1 of 8 Last

\*Deduction Code CHAR10 SECC Dane County

Deduction Details Find | View All First 1 of 1 Last

\*Effective Date 12/14/2014  Take on all Paygroups

\*Calculation Routine Flat Amount  Ded stopped by Self Serv User

Deduction End Date 12/12/2015

Deduction Rate or %

Flat/Addl Amount \$4.00

Goal Amount \$104.00

Current Goal Balance \$104.00

This data was last updated by System Data last updated on 12/16/2015

# Payroll: Federal Tax Data Page

**Changes:** Removing the Additional Percentage and Exempt from FUT fields and the Local Tax Data tab

The screenshot displays the 'Federal Tax Data' page for a person. At the top, there are three tabs: 'Federal Tax Data', 'State Tax Data', and 'Local Tax Data'. The 'Local Tax Data' tab is highlighted with a red box, indicating its removal. Below the tabs, the 'Person ID' field is visible. The main content area is titled 'Tax Data' and includes a search bar with 'Find | View All' and navigation buttons for 'First', '1 of 1', and 'Last'. The 'Company' is listed as 'UWS University of Wisconsin System'. The '\*Effective Date' is '09/18/2016'. The 'Updated By' is 'System' and the 'Date Last Updated' is '01/03/2017'. The 'Federal Withholding Elements' section contains several fields: '\*Special Withholding Tax Status' (None), '\*Tax Marital Status' (Married), a checkbox for 'Check here and select Single status if married but withholding at single rate.', 'Withholding Allowances' (2), 'Additional Amount' (\$0.00), 'Additional Percentage' (0.000), and a checked checkbox for 'Exempt from FUT'. The 'Additional Percentage' and 'Exempt from FUT' fields are highlighted with a red box, indicating their removal. Below this section are several expandable sections: 'W-4 Processing Status', 'Lock-In Letter Details', 'State Tax Options', 'Special Tax Form Renewal', and 'Tax Treaty/Non-Resident Data'.

# Payroll: Federal Tax Data Page

## Future State

Federal Tax Data | State Tax Data

Person ID

Tax Data ? Find | View All First 2 of 8 Last

Company UWS University of Wisconsin System

\*Effective Date 09/18/2016

Updated By System Date Last Updated 01/03/2017

**Federal Withholding Elements ?**

\*Special Withholding Tax Status None

\*Tax Marital Status Married Married

Check here and select Single status if married but withholding at single rate.

Withholding Allowances 2

Additional Amount \$0.00

▶ W-4 Processing Status ?

▶ Lock-In Letter Details ?

▶ State Tax Options ?

▶ Special Tax Form Renewal

▶ Tax Treaty/Non-Resident Data ?



# Payroll: State Tax Data Tab

**Change:** Removing the Additional Percentage field

Federal Tax Data | **State Tax Data** | Local Tax Data

Person ID

Tax Data ? Find | View All First 1 of 1 Last

Company UWS University of Wisconsin System Effective Date 09/18/2016

State Information Find | View All First 1 of 1 Last

\*State WI Wisconsin

Resident  UI Jurisdiction

Non-Residency Statement Filed  Exempt From SUT

State Withholding Elements ?

\*Special Withholding Tax Status None

\*Tax Marital Status M Married

Withholding Allowances 2

Additional Amount \$0.00

**Additional Percentage 0.000**

Additional Allowances 0

# Payroll: State Tax Data Tab

## Future State

Federal Tax Data | **State Tax Data**

Person ID

-----

**Tax Data** ? Find | View All First 2 of 8 Last

Company UWS University of Wisconsin System Effective Date 09/18/2016 + -

**State Information** Find | View All First 1 of 1 Last

\*State MI Wisconsin + -

Resident  UI Jurisdiction  
 Non-Residency Statement Filed  Exempt From SUT

**State Withholding Elements** ?

\*Special Withholding Tax Status None

\*Tax Marital Status M Married

Withholding Allowances 2

Additional Amount \$0.00

Additional Allowances 0

▶ **Lock-In Letter Details** ?

**Tax Form Renewal Processing Status**

None  Tax Form Renewal Received  Notification Sent

# TAM: Inactivate Online Account

**Future State:** Inactivate Online Account field will be grayed out

**Note:** This can only be adjusted by those having the Recruitment Administrators security role which is limited to the Service Center.

The screenshot displays the 'Applicant Data' tab of a TAM system. The 'Applicant' section includes fields for '\*Applicant Type' (External Applicant) and 'Preferred Contact' (Not Specified). The 'Applicant Status' section includes fields for '\*Status Code' (Active), 'Status Reason', and 'Status Date' (03/22/2018). A red box highlights the 'Registered Online - Yes' section, which contains an unchecked checkbox labeled 'Inactivate Online Account'.

Applicant	Applicant Status
*Applicant Type: External Applicant	*Status Code: Active
Preferred Contact: Not Specified	Status Reason: [Dropdown]
	Status Date: 03/22/2018
	Registered Online - Yes
	<input type="checkbox"/> Inactivate Online Account

# Time and Labor: Web Clock

## Changes:

- Gray out Time Zone field
- Rename Rule Element 1 field to Comp Time
- Rename Rule Element 2 field to Lunch Deduct

The screenshot displays the 'Web Clock' interface. At the top, there is a navigation bar with 'Favorites', 'Main Menu', 'Self Service', 'Time Reporting', 'Report Time', and 'Web Clock'. Below the navigation bar, the user's name 'IS SPECIALIST CONF' and 'Employee ID 00' are visible. The 'Your Last Recorded Punch' section is empty. The 'Enter Punch' section contains a dropdown for '\*Punch Type' and a button 'Enter Punch'. Below this, the 'Time Reporting Elements' section is expanded. It shows 'Day Monday', 'Taskgroup UW\_DEFAULT', 'Task Profile ID', and 'Time Reporting Code'. The 'Rule Element 1' and 'Rule Element 2' fields are highlighted with red boxes. The 'Time Zone' field is grayed out and contains 'CST'. At the bottom, there is a 'Comments' field with a character count of '254 characters remaining' and an 'Enter Punch' button.

# Time and Labor: Web Clock

## Future State

Favorites ▾ | Main Menu ▾ > Self Service ▾ > Time Reporting ▾ > Report Time ▾ > Web Clock

### Web Clock

Employee ID 00.  
Employment Record 0

**Your Last Recorded Punch**

Enter Punch ?

\*Punch Type  Enter Punch

Time Zone  Central Time (US)

▼ **Time Reporting Elements**

Day Monday

Taskgroup  UW Default

Task Profile ID

Time Reporting Code

Comments   
254 characters remaining

Enter Punch

[Request Overtime](#)  
[View Holiday Schedule](#)

# Time and Labor: Maintain Time Reporter

## Changes:

1. Removed 'Restriction Profile ID' field
2. Removed 'Rule Element 3' field
3. Removed 'Rule Element 4' field
4. Removed 'Rule Element 5' field
5. Grayed out 'Send Time to Payroll' field
6. Renamed 'Rule Element 1' field name to 'Comp Time'
7. Renamed 'Rule Element 2' field name to 'Lunch Deduct'

The screenshot displays the 'Maintain Time Reporter Data' page. The breadcrumb trail is 'Time and Labor > Enroll Time Reporters > Maintain Time Reporter Data'. The page title is 'Maintain Time Reporter Data'. The user is logged in as 'Employee' with 'ID 000'. The 'Time Reporter Data' section includes the following fields: '\*Effective Date' (08/08/2017), '\*Time Reporter Type' (Elapsed Time Reporter), 'Elapsed Time Template' (UW\_ELP\_DFT), 'Punch Time Template', 'Time Period ID' (UW\_BIWEEKLY), '\*Workgroup' (UWP00EPE00), '\*Taskgroup' (UW\_DEFAULT), 'Task Profile ID', 'TCD Group', 'Restriction Profile ID', 'Rule Element 1', 'Rule Element 2', 'Rule Element 3', 'Rule Element 4', 'Rule Element 5', and 'Time Zone' (CST). The 'Payroll' section has a checked 'Send Time to Payroll' checkbox. The 'Commitment Accounting' section has checked 'For Taskgroup' and 'For Department' checkboxes.

# Time and Labor: Maintain Time Reporter

## Future State

Favorites ▾ Main Menu ▾ > Time and Labor ▾ > Enroll Time Reporters ▾ > Maintain Time Reporter Data

### Maintain Time Reporter Data

..... 7 ID 000 Employment Record 0

Organizational Relationship Employee Badge Detail Group Membership

#### Time Reporter Data

Find | View All First 1 of 1 Last

\*Effective Date 08/06/2017 \*Status Active

\*Time Reporter Type Elapsed Time Reporter

Elapsed Time Template UW\_ELP\_DFT UW Elapsed Default Template

Punch Time Template

Time Period ID UW\_BIWEEKLY UW Biweekly

\*Workgroup UWP00EPE00 UWP Exempt Pos Elapse

\*Taskgroup UW\_DEFAULT UW Default

Task Profile ID

TCD Group

Comp Time

Lunch Deduct

Time Zone CST Central Time (US)

**Payroll**

- Send Time to Payroll

**Commitment Accounting**

- For Taskgroup
- For Department

Save Return to Search Previous in List Next in List Notify Refresh Update/Display Include History Correct History

## What is a WorkCenter?

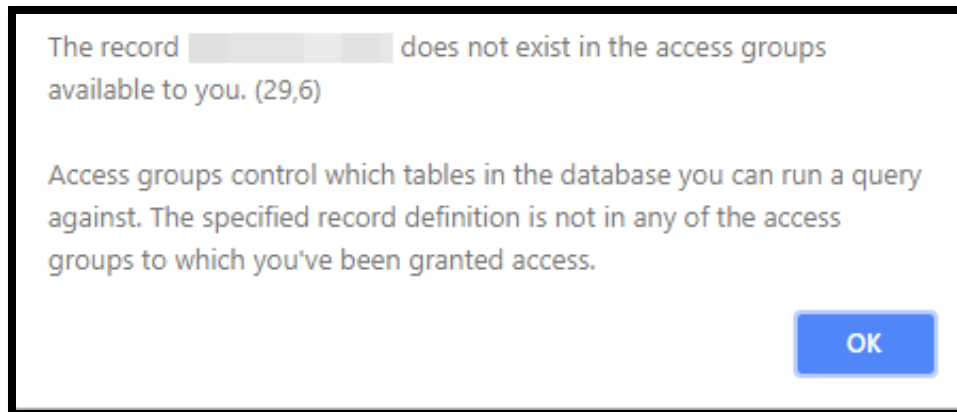
- WorkCenter functionality brings many aspects of one's work into a single location. The WorkCenter includes:
  - Custom navigation collections
  - Groups of reports and queries
  - Alerts
  - Links
- Enables users to access various pages and perform daily tasks without leaving the WorkCenter
  - Reduces the time used when navigating through menus



## Finance WorkCenter Location:

Payroll for North America > Payroll Distribution > Commitment Accounting USA > UW Finance WorkCenter

- Users may click “Add to Favorites” for easy navigation in future. Refer to [KB-21195](#) on how to add menu navigation as favorites.
- Users have access to add additional queries to personalize their WorkCenter. Refer to KB [KB-59888](#) for personalizing HRS content and layout.
- If a user does not have security to access query or a report they will still be able to see the query or report name in the WorkCenter folder, but will not be able to run them. Users will get the following error message.




# Finance: WorkCenter

Users with the following roles will have access to this WorkCenter:

<b>Role Description:</b>	<b>Role Name:</b>
FI Campus Direct Retro Entry	UW_UNV_FI_DIR_RTRO_ENTRY_UPD
FI Campus Direct Retro VW	UW_UNV_FI_DIR_RTRO_VIEW
FI Campus Funding - All Campus	UW_UNV_FI_FUNDING_ALL_UPD
FI Campus Funding Error Rpt	UW_UNV_FI_FUNDING_ERRS_RPTS
FI Campus User Funding Reports	UW_UNV_FI_REPORTS
FI Campus Funding One BU	UW_UNV_FI_FUNDING_ONE_UPD

# Finance: WorkCenter


All Search [Advanced Search](#)

[Favorites](#) | [Main Menu](#) | [Payroll for North America](#) | [Payroll Distribution](#) | [Commitment Accounting USA](#) | [UW Finance WorkCenter](#)

---

UW Finance WorkCenter

**Links**

- ▶ HRS Pages
- ▶ Other
- ▶ KB

**Queries**

- Query Manager
- ▼ Finance Queries
  - No Appt-Level Funding Report
  - Funding Edit Results
  - Suspense Funding Report
  - Encumbrance Totals by Emplid

**Reports/Processes**

- ▼ Finance Reports
  - Project/Department Inactive Funding Rpt.
  - Funding Edit Errors Inquiry
  - Funding (CA) Audit Report

**UW WorkCenter Notepad**

Data in notepad disappears if you navigate away

**Funding Edit Errors**

Funding Edit Errors (as of Most Recent Payroll Calc)

Dept ID	Unit	ID	Empl Record	Year	Combo code	Bdgt Level	Acct	Pay Period End	Project	Error field
A020821	UWMSN	00290656	0	2018	101-020821-1-MSN	D	1531	2018-04-28		0
A020821	UWMSN	00875861	0	2018	101-020821-1-MSN	D	1771	2018-04-28		0
A022015	UWMSN	00768975	0	2018	101-022015-1-MSN	D	1771	2018-04-28		0
A022050	UWMSN	00831360	1	2018	101-022050-1-MSN	D	1771	2018-04-28		0
A022050	UWMSN	00884469	0	2018	101-022050-1-MSN	D	1771	2018-04-28		0
A037780	UWMSN	00887791	0	2018	128-037780-1-MSN	D	1531	2018-04-28		0
A042510	UWMSN	00798670	3	2018	136-042515-0-MSN	D	1771	2018-04-28		0
A042510	UWMSN	00904370	1	2018	136-042515-0-MSN	D	1771	2018-04-28		0
A042560	UWMSN	00828039	1	2018	101-042560-0-MSN	D	1771	2018-04-28		0
A042560	UWMSN	00911658	0	2018	101-042560-0-MSN	D	1771	2018-04-28		0

Full Query Results

*Query references error outputs from most recent calc, and will refresh after next calc*

**Workflow Exception Dashboard**

**Hello Bindi, you have claimed 0 and completed 0 errors.**

Module:  Priority:  Business Unit:  Dept ID:  (or) DeptID (like):

Error ID	Priority	Error Desc	Module	Total Errors
1	High	UW FI FUNDING EDIT Employees who need funding action. Report updated overnight each day payroll is being calculated	Finance	157

Batch Run Date: 05/05/2018

# Resources

- Resources for these changes will be found on the HRS Project Readiness page:

**HRS Project Readiness**

UNIVERSITY OF WISCONSIN SYSTEM  
**UW**  
SERVICE CENTER

Introduction **HRS 9.2 Maintenance (PUM)** Punch Hourly Integrated Timesheet (PHITs)  
Workflow for Additional Pay (WfAP)

**HRS 9.2 Maintenance (PUM) Introduction**

With the upgrade of HRS to PeopleSoft version 9.2, the Service Center has made a commitment to keep HRS up to date. The upgrade has also positioned us to take full advantage of Oracle's new release strategy. While in the past Oracle provided new functionality in the context of full version releases (e.g. version 9.2), Oracle now releases updates quarterly 'PeopleSoft Update Manager' (or 'PUM') updates. These updates provide us an opportunity to introduce new functionality into HRS according to our own schedule and timeline.

The Service Center will be managing the development, testing and release of select new PUM-delivered functionality as an ongoing project, which we are calling 'HRS 9.2 Maintenance (PUM)'. The pages on this site are intended to provide useful information to help the UW institutions understand, plan for and support the implementation of this new functionality.

**Next Scheduled PUM 26 Implementation: Sunday, September 9, 2018**

# Questions?



# UIA Life Insurance Annual Deduction Processing

- University Insurance Association (UIA) Life Insurance Eligibility:
  - Faculty/ Academic Staff / Limited Appointees (FA/AS/LI)
  - Actively employed on October 1<sup>st</sup> of the deduction year
  - Meet the minimum monthly salary threshold – for 2018-19 plan year the threshold is **\$2,658** per month
    - Lump Sum, Ad Hoc (Zero Dollar) and inactive appointments (summer service/session) are not factored into the monthly salary
- Eligibility reviewed annually
- Premium deduction will be on the October Monthly Payroll - Paid November 1, 2018

# UIA Life Insurance Annual Deduction Processing

- Individuals not qualifying this year will be sent conversion information.
- Employees on LOA that meet the annual qualifications will be sent a Benefits Billing Statement.
  - Those who have not paid by December 1<sup>st</sup> (post marked) will have coverage terminated for the 2018-19 plan year, as of September 30, 2018.
- Employees who retire will be sent continuation information through the COBRA process.
- Employees who terminate will be sent conversation information through the COBRA process.

# UIA Life Insurance Annual Deduction Processing

## *UW System HR Responsibilities:*

- Send Benefits Billing statements directly to eligible employees on an approved LOA, along with November reminders.
  - A list of affected employees will be provided to institutions at the time the statement are mailed to employees.
  - Payments must be post marked by December 1, 2018.



# UIA Life Insurance Annual Deduction Processing

## *UW System Service Center Responsibilities:*

- Send out conversion email and list of ineligible employees to institutions in advance of email to employee.
- Send out conversion emails to employees who did not qualify for the 2018-2019 plan year no later than October 5, 2018.
- Receive Benefits Billing Payments
  - Payments post marked after December 1, 2018 will be returned to the employee.
- Enter Benefit Billing and update HRS to reflect the Benefits Billing Payment.
- For questions or concerns, contact UW System HR:  
[uwshr@uwsa.edu](mailto:uwshr@uwsa.edu).

# UIA Life Insurance Annual Deduction Processing

- UIA process will be run September 20, 2018
- UIA events created effective October 1, 2018
  - Only employees whose eligibility has changed will get an event
    - Eligible Empl Classes: FA, AS, LI, OT1
    - Excluded: Lump Sum or FTE equal to 0.000250
    - Eligibility Field 5 will be updated with Y or N
- Process events identified on the New Hire Hold, MSC Evaluation Report and the BAS Open Action Required WED by September 19<sup>th</sup> to ensure successful UIA event finalization.

# Questions?



# TAM: New Applicant Disposition

## **New Applicant Disposition: Applicant Rejected Offer**

- Allows TAM users to indicate an applicant rejected an offer when not using the Offer component.
- Includes the same Status Reasons as when an Applicant rejects an offer through the Offer component
  - Another Job
  - Base Salary
  - Benefits
  - Facilities
  - Other Compensation
  - Partner Not Accommodated
  - Personal
  - Start Up Package

## **Applicant Rejected Offer: Manage Job Opening**

- Applicant Rejected Offer will have the same access and functionality as “Withdrawn Application” on the Manage Job Opening - Applicants page.
- When selected, Applicant will display as “AppRejOff” in the disposition column and will appear under the Reject tab.

## **Rejected Job Offer Report (UWTAR008)**

- Applicant Rejected Offer will also be included in the Rejected Job Offer Report (UWTAR008) alongside the original disposition from the Offer component.
- Navigation: Recruiting > UW Reports > Rejected Job Offer Report

# TAM: New Applicant Disposition

## Manage Job Opening

Return | Search Job Openings | Previous | Next | Create New | Clone | Refresh | Add Note | No Category | Print Job Opening Personalize

Job Opening ID		Status	010 Open
Job Posting Title		Business Unit	
Job Code		Department	
Position Number		Job Family	

Applicants | Applicant Search | Applicant Screening | Activity & Attachments | Details

All (31)	Applied (0)	Screen (17)	Route (0)	Interview (5)	Offer (0)	Hire (1)	Hold (0)	Reject (8)
----------	-------------	-------------	-----------	---------------	-----------	----------	----------	------------

Select	Applicant Name	Applicant ID	Type	Disposition	Application	Resume	Mark Reviewed	Route	Interview	Reject	Print	Date Submitted	Other Actions
<input type="checkbox"/>			External	Interview								01/14/2018 1:26PM	Other Actions
<input type="checkbox"/>			External	Screen								02/15/2018 11:37PM	Other Actions
<input type="checkbox"/>			External	Interview								02/09/2018 10:24AM	Other Actions
<input type="checkbox"/>			External	Cnsdr Intv								02/27/2018 12:37AM	Other Actions
<input type="checkbox"/>			External	Screen								01/15/2018 3:18PM	Other Actions
<input type="checkbox"/>			External	Interview								02/15/2018 11:06PM	Other Actions
<input type="checkbox"/>			External	Unqualifd								01/26/2018 4:57PM	Other Actions
<input type="checkbox"/>			External	Unqualifd								01/12/2018 4:12PM	Other Actions
<input type="checkbox"/>			External	Interview								02/02/2018 10:27PM	Other Actions
<input type="checkbox"/>			External	Screen								02/26/2018 2:25AM	Other Actions
<input type="checkbox"/>			External	Screen								01/28/2018 4:00PM	Other Actions
<input type="checkbox"/>			External	Screen								01/23/2018 8:45AM	Other Actions
<input type="checkbox"/>			Employee	Screen								01/31/2018 10:16AM	Other Actions
<input type="checkbox"/>			External	Screen								01/17/2018	Other Actions

Select "Edit Disposition" on the Applicant you would like to update

- Recruiting Actions
- Applicant Actions
  - Create Interview Evaluation
  - Prepare Job Offer
  - Withdraw Application
  - Edit Application Details
  - Edit Disposition**

# TAM: New Applicant Disposition

The screenshot displays the 'Edit Disposition' dialog box over a table of applicant records. The dialog box contains the following fields and options:

- Current Disposition:** 060 Interview
- \*New Disposition:** A dropdown menu with a list of status reasons. The option '131 Applicant Rejected Offer' is highlighted in blue.
- Status Reason:** A list of reasons including: 015 Linked, 019 Linked Questionnaire, 030 Screen, 03A Considered for Interview, 03B Under Review, 03C Does Not Meet Minimum Qual, 050 Route, 060 Interview, 070 Offer, 071 Offer Accepted, 080 Ready to Hire, 090 Hired, 100 Hold, 110 Reject, 112 Failed Prescreening, 115 Reject Online Screening, 120 Withdrawn, 130 Withdrawn Application, and 140 Inactive.
- Date:** A field for entering the date.
- Buttons:** 'Save' and a button with a checkmark icon.
- Help:** A link in the top right corner.

The background table shows applicant records with columns for status, date, and actions. The status column contains icons for various dispositions, and the date column shows dates from 2/2018 to 6/2018. The actions column contains a dropdown menu labeled 'Other Actions'.

# TAM: New Applicant Disposition

Find | View All | [Print] | [Calendar] First [Previous] 1-2

### Edit Disposition

Current Disposition 060 Interview

\*New Disposition 131 Applicant Rejected Offer

Status Reason [Dropdown]

Date [Dropdown]

Save [Button]

- Another Job
- Base Salary
- Benefits
- Facilities
- Other Compensation
- Partner Not Accommodated
- Personal
- Start Up Package

[Checkmark]	[People]	[Calendar]	[Calendar]	[Other Ac]
[Checkmark]	[People]	[Calendar]	02/26/2018 5:27PM	[Other Ac]
[Checkmark]	[People]	[Calendar]	02/12/2018 2:02PM	[Other Ac]
[Checkmark]	[People]	[Calendar]	02/02/2018 10:27PM	[Other Ac]



# TAM: New Applicant Disposition

## Manage Job Opening

Return | Search Job Openings | Previous | Next | Create New | Clone | Refresh | Add Note | No Category | Print Job Opening Personalize

Job Opening ID: \_\_\_\_\_ Status: 010 Open  
Job Posting Title: \_\_\_\_\_ Business Unit: \_\_\_\_\_  
Job Code: \_\_\_\_\_ Department: \_\_\_\_\_  
Position Number: \_\_\_\_\_ Job Family: \_\_\_\_\_

Applicants | Applicant Search | Applicant Screening | Activity & Attachments | Details

All (31) | Applied (0) | Screen (17) | Route (0) | Interview (4) | Offer (0) | Hire (1) | Hold (0) | Reject (9)

Once saved, the Applicant Disposition will update to AppRejOff on the Manage Applicants Screen

Select	Applicant Name	Applicant ID	Type	Disposition	Application	Resume	Mark Reviewed	Route	Interview	Reject	Print	Date Submitted	
<input type="checkbox"/>			External	Interview								01/14/2018 1:26PM	Other Actions
<input type="checkbox"/>			External	Screen								02/15/2018 11:37PM	Other Actions
<input type="checkbox"/>			External	Interview								02/09/2018 10:24AM	Other Actions
<input type="checkbox"/>			External	Cnsdr Intv								02/27/2018 12:37AM	Other Actions
<input type="checkbox"/>			External	Screen								01/15/2018 3:18PM	Other Actions
<input type="checkbox"/>			External	AppRejOff								02/15/2018 11:06PM	Other Actions

# TAM: New Applicant Disposition

## Manage Job Opening

[Return](#) | [Search Job Openings](#) | [Previous](#) | [Next](#) | [Create New](#) | [Clone](#) | [Refresh](#) | [Add Note](#) | [No Category](#) | [Print Job Opening](#) [Personalize](#)

Job Opening ID: \_\_\_\_\_ Status: 010 Open  
 Job Posting Title: \_\_\_\_\_ Business Unit: \_\_\_\_\_  
 Job Code: \_\_\_\_\_ Department: \_\_\_\_\_  
 Position Number: \_\_\_\_\_ Job Family: \_\_\_\_\_

[Applicants](#) | [Applicant Search](#) | [Applicant Screening](#) | [Activity & Attachments](#) | [Details](#)

All (31)	Applied (0)	Screen (17)	Route (0)	Interview (4)	Offer (0)	Hire (1)	Hold (0)	Reject (9)
----------	-------------	-------------	-----------	---------------	-----------	----------	----------	------------

When Applicant Status is set to Applicant Rejected Offer, they will now appear in the Reject tab of Manage Job Openings

Select	Applicant Name	Applicant ID	Type	Disposition	Application	Resume	Mark Reviewed	Route	Interview	Reject	Print	Date Submitted	Other Actions
<input type="checkbox"/>			External	AppRejOff								02/15/2018 11:06PM	Other Actions
<input type="checkbox"/>			External	Unqualifd								01/26/2018 4:57PM	Other Actions
<input type="checkbox"/>			External	Unqualifd								01/12/2018 4:12PM	Other Actions
<input type="checkbox"/>			External	Unqualifd								01/14/2018 11:13AM	Other Actions
<input type="checkbox"/>			External	Unqualifd								01/16/2018 5:06PM	Other Actions
<input type="checkbox"/>			External	Unqualifd								01/16/2018 3:09PM	Other Actions
<input type="checkbox"/>			External	Unqualifd								01/19/2018 1:41AM	Other Actions
<input type="checkbox"/>			External	Unqualifd								02/28/2018 1:01AM	Other Actions
<input type="checkbox"/>			External	Wdraw App								02/16/2018 11:48AM	Other Actions

[Select All](#) | [Deselect All](#) | [Group Actions](#)

# Questions?



# Non-Standard Processing Schedule

## 9B Processing Schedule:

- 9/14 Create Paysheets (Friday)
- 9/17 Payline Deadline – 4:30 pm (Monday)
- 9/17 Payline Load (Monday)
- 9/18 FICA Deadline (Tuesday)
- 9/19 Final Calc/Confirm – Noon (Wednesday)

## 9M Processing Schedule:

- 9/20 Create Paysheets (Thursday)
- 9/21 Payline Deadline – 4:30 pm (Friday)
- 9/23 Payline Load (Sunday)
- 9/24 FICA Deadline (Monday)
- 9/25 Final Calc/Confirm – 10:00 am (Tuesday)

# Questions?



# Communities of Practice

- At this year's summer conference, a new concept was introduced at the request of past attendees called Community of Practice. (See the CoP framework document)
- CoPs are learning communities where members of that community share a specific domain of knowledge and have common ground in the work they perform.
- It was well received by participants with a request to continue engagement among those communities moving forward.
- These CoPs will be led by volunteer institution subject-matter-experts and membership is comprised of all UW System staff who engage in similar work who wish to participate.

# Communities of Practice – Kick Off

- Formal kickoff teleconference is scheduled for September 11 from 9:00-10:00 a.m. (in lieu of AG calls).
- HR, Payroll and Benefits CoPs will come together to discuss leader & co-leader roles, responsibilities, nominations, strategic planning and a formal structure for ongoing touch-points and communication.
- Please pass the information along to your colleagues. All are welcome to attend.
- Agenda and teleconference information will be sent next week.

# Upcoming Learning Path Courses

- **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
- **Benefits Enrollments – at the Service Center**
  - Sept 11
- **Benefits Deductions – at the Service Center**
  - Sept 11



# PY Calendar Review

September 2018						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	31	1 [9M] Pay Period Begin [9A] Pay Period End
2 [9A] 1st Batch Prelim Calc [9B] Pay Period Begin	3 [9A] 2nd Batch Prelim Calc Labor Day	4 [9A] Payroll and Benefit Retro and Payline Load [9A] 3rd Batch Prelim Calc	5 [9A] FICA Deadline [9A] 4th Batch Prelim Calc	6 [9A] Confirmation Deadline (Eve) [9A] Final Calc	7	8
9	10	11	12	13 [9A] Pay Date	14 [9B] 1st Batch Prelim Calc	15 [9B] Pay Period End
16 [9B] 2nd Batch Prelim Calc [9C] Pay Period Begin	17 [9B] 3rd Batch Prelim Calc [9B] Payroll and Benefit Retro and Payline Load	18 [9B] 4th Batch Prelim Calc [9B] FICA Deadline	19 [9B] Confirmation Deadline (Eve) [9B] Final Calc	20 [9M] 1st Batch Prelim Calc	21 [9M] 2nd Batch Prelim Calc	22 [9M] 3rd Batch Prelim Calc
23 [9M] 4th Batch Prelim Calc [9M] Payroll and Benefit Retro and Payline Load	24 [9M] 5th Batch Prelim Calc [9M] FICA Deadline	25 [9M] Confirmation Deadline (Mor) [9M] Final Calc	26	27 [9B] Pay Date	28	29 [9C] Pay Period End
30 [9M] Pay Period End [9C] 1st Batch Prelim Calc [10A] Pay Period Begin	1	2	3	4	5	6

# Institutional Feedback

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