UW UNIVERSITY OF WISCONSIN SYSTEM
SERVICE CENTER

Affinity Group
January 8, 2019

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*

- HR: EJED Monitoring
- BN: ABE Appeals Reminder
          TSA Program EZ Enrollment Form
- PY: Exception Payroll Processing
- TL: Elapsed Hourly Integrated Timesheet

          Non-Standard Processing Schedule
          Calendar Review
          Upcoming Training
          UW Portal Article
          Important Year-End Payroll Dates
          Institutional Feedback

UNIVERSITY OF WISCONSIN SYSTEM
SERVICE CENTER

EJED Monitoring

- ## EJED Monitoring
  - ### Run EJED Query as part of your daily routine
    - Send out email notes to supervisors asking for confirmation of employment termination
    - Best practice – Run and review EJED Query in advance
- ## EJED Query:
  - ### KB 19326 HR - Expected Job End Date Query
    - Navigation path: *Reporting Tools > Query Viewer > UW_HR_EXPECTED _JOB_END_DATE*
    - Search Criteria - complete ALL four fields/options
    - Results in Excel can be sorted
- ## Take appropriate action to EJEDs on Job data
  - ### KB 16409 HR - Maintaining Expected Job End Date
    - Reminder: Continuity may also need to be updated on the Position when making changes to the EJED.

UNIVERSITY OF WISCONSIN SYSTEM
SERVICE CENTER

EJED Monitoring cont'd

EJED Termination Report:
- [KB 16700](#) HR - HR Report List
  - Delivered nightly through Cypress
  - Lists the employees that were terminated during the nightly or monthly batch processes
  - Also shows if the employee was enrolled in benefits
- Best Practice – Used as a confirmation tool

January Monthly EJED will process on January 24th.

UNIVERSITY OF WISCONSIN SYSTEM
SERVICE CENTER

5

BN: ABE Appeal Reminders

- Appeals must be completely filled out <u>before</u> submission to UWSC
  - Including employer section

- If appeals are not filled out completely and correctly, they will be returned to the institution
  - This causes delays to the appeals process

Appeals must be submitted by
<u>January 31, 2019,</u> to ensure they will be reviewed.

UNIVERSITY OF WISCONSIN SYSTEM
SERVICE CENTER

TSA Program EZ Enrollment Form

Effective January 11, 2019, there will be an updated EZ Enrollment Form available on the UW TSA 403(b) Program website.

This form combines the information from three separate provider-supplied forms.

TSA Program EZ Enrollment Form

Here are the forms that will be phased out and no longer be accepted:

Fidelity (one-sided flyer)

T. Rowe Price (brochure)

TIAA (folded pamphlet)

Fidelity ("Workplace Contribution Form")

TSA Program EZ Enrollment Form

If you receive one of the old forms, please have the employee fill out the updated form. Keep in mind:

- EZ Enrollment forms should only be used when the employee is opening a new account with the TSA provider selected.
  - Institution benefits staff enter the deduction in HRS
  - UW SHR TSA staff will create and set up the account with the provider
- Salary Reduction Agreements should be used:
  - To start a deduction (check with the employee that their account has been created with the provider prior to the deduction being entered)
  - To stop a deduction
  - To change a current deduction (the employee can also use HRS to make a change to an already existing deduction)

UNIVERSITY OF WISCONSIN SYSTEM

- Keep original forms (either the EZ Enrollment Form or Salary Reduction Agreement) in the employee benefits file.

- Make sure the entire form is filled out, <u>including the institution section at the bottom</u>.

- For the EZ Enrollment Form, please scan (*preferred method*) to <u>uwshr@uwsa.edu</u> or fax to the UWSHR office prior to the final calc and confirm for the affected pay date.

  – Please do not send forms directly to UWSHR TSA staff

TSA Program EZ Enrollment Form

Please link directly to the address provided below. Discard any blank copies of the old forms.

https://www.wisconsin.edu/ohrwd/benefits/download/ret/tsa/ezenroll.pdf

Contact uwshr@uwsa.edu with questions.

UNIVERSITY OF WISCONSIN SYSTEM

- This topic is from a campus request to review when it is appropriate to do the following actions:

  - Negative Payline Request
  - ACH Reversal
  - Check Correction
  - Payline Request
  - Missed Payroll Request

UNIVERSITY OF WISCONSIN SYSTEM
SERVICE CENTER

Exception Payroll Processing

Overpayment Options:

- Negative Payline Requests (preferred method)
- ACH Reversal (limited use)
- Check Correction

UNIVERSITY OF WISCONSIN SYSTEM
SERVICE CENTER

Negative Payline Request

Used For:

- Overpayment of gross wages

Request When:

- Employee is active and will have future on-cycle paychecks
- Request can be applied to more than one payroll ("payment plan")
- Use Payroll Payline Entry Template
  - https://uwservice.wisconsin.edu/administration/payroll/
- Submit errors using pay period dates

UNIVERSITY OF WISCONSIN SYSTEM
SERVICE CENTER

ACH Reversal

Used For:

- Excessive overpayments that cannot be reasonably repaid via a payline

Request When:

- Active employee will not be able to pay back overpayment via negative paylines in one or two payrolls
- Overpayment was made on employee's last paycheck and error is caught at least 3 days before pay date to guarantee return of funds
- Bank Fraud/Lost Debit Card/Lost Checks
- Send in ACH reversal request to your AG

UNIVERSITY OF WISCONSIN SYSTEM
SERVICE CENTER

Check Correction

Used For:

- Overpayment of gross wages
- Overpayment of net wages due to missed deductions
- Over-used leave upon termination

Request When:

- Employee has an inactive status and will not have future earnings (negative payline request is not an option)
- Does not meet the ACH Reversal criteria
- Active employee excessive overpayment after the 3 day ACH reversal window
- See KB #27632 for more information

UNIVERSITY OF WISCONSIN SYSTEM
SERVICE CENTER

Underpayment Options:

- On-Cycle:
  - Regular processing through HRS
    - Enter and approve time for hourly employees
    - Payroll Retro
  - Payline Request
- Off-Cycle:
  - Missed Payroll Request (MPR)
- Best Practice:
  - Use MPR as last option – always ask employee if missed payment can be added to the next on-cycle paycheck

UNIVERSITY OF WISCONSIN SYSTEM
SERVICE CENTER

Payline Request

- Active Employees:

  - Missed pay that doesn't meet the MPR guidelines or can wait until next on-cycle payroll (regular hours for hourly EEs should be entered on the timesheet)
  - Incorrectly calculated retro pay or retro pay that failed to load to employee's paycheck

- Inactive Employees:

  - Leave payouts after termination
  - Time entered into HRS after termination

- For payline requests, use the Payroll Payline Entry Template or Leave Payout Template

  - https://uwservice.wisconsin.edu/administration/payroll/

UNIVERSITY OF WISCONSIN SYSTEM
SERVICE CENTER

Missed Payroll Request

Eligibility Criteria (see KB-22181):

- Regular Hours/Gross wages

  - Student Help – minimum of 5 hours
  - University Staff & Academic Hourly Staff – minimum of 8 hours
  - FA/AS/LI – minimum of 10% of regular gross pay

- Lump Sum payments – Must Follow WfAP Guidelines
  - Biweekly Student - $100 minimum
  - Biweekly Non-Student - $300 minimum
  - Monthly - $1,000 minimum

- Items not accepted for MPR:

  - Overload, Overtime or Add-Ons
  - Additional Pay not part of regular gross
  - Term Leave Payouts
  - Retroactive Pay
  - Missed Pay Older than 1 Pay Period

UNIVERSITY OF WISCONSIN SYSTEM
SERVICE CENTER

Elapsed Hourly Integrated Timesheet

As introduced in the Payroll and Benefits User Group Meeting, the new Elapsed (Exempt) Hourly Integrated Timesheet will be implemented in HRS. The Elapsed Hourly Integrated Timesheet will be available on February 10, 2019 with an effective date of February 3, 2019.

- Any time or absences entered prior to 2/10 will seamlessly convert to the new format.

Enhanced Features Include:

- Absence submission/edit/cancelation from the timesheet
- Condensed and efficient format
- Ability to delete multiple rows at once
- Ability to copy hours from previous period
- Enhanced exception visibility
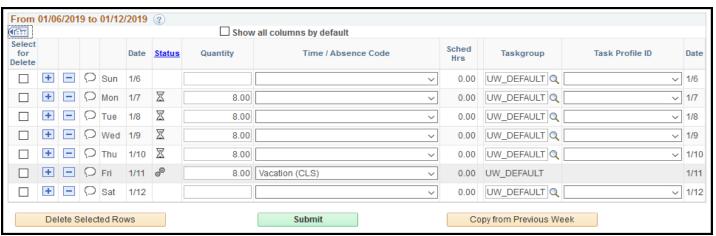- Reported and payable time status icons

UNIVERSITY OF WISCONSIN SYSTEM
SERVICE CENTER

Elapsed Hourly Integrated Timesheet

Collapsed View:

Expanded View:

Dates to Remember:

- **Week of 1/28**
  - AG Call: Walkthrough of Resources
  - Resources available to Payroll Coordinators
  - Template communication and list of employees will be provided to each campus for distribution
- **Week of 2/4:**
  - Resources available to employees
- **Week of 2/10:**
  - Timesheet is live with effective date of 2/3

UNIVERSITY OF WISCONSIN SYSTEM
SERVICE CENTER

Non-Standard Processing Schedule

1B Processing Schedule:

- 1/18   Create Paysheets (Friday)
- 1/18   Payline Deadline – 4:30 pm (Friday)
- 1/21   Payline/Retro Load (Monday - holiday)
- 1/22   FICA Deadline (Tuesday)
- 1/23   Final Calc/Confirm – Noon (Wednesday)

1M Processing Schedule:

- 1/24   Create Paysheets (Thursday)
- 1/25   Payline Deadline – 4:30 pm (Friday)
- 1/26   Payline/Retro Load (Saturday)
- 1/27   FICA Deadline (Sunday)
- 1/28   Final Calc/Confirm – noon (Monday)

UNIVERSITY OF WISCONSIN SYSTEM
SERVICE CENTER

PY Calendar Review

The training schedule for the new year has been released

- HR training held at the Service Center in Madison:
  - Introduction to Hiring
    - 2/27/19 – 8:30 am
  - Updates: Person, Position, Job
    - 2/27/19 – 1:00 pm
  - Rehires, Transfers, Multiple Jobs
    - 2/28/19 – 9:00 am

UNIVERSITY OF WISCONSIN SYSTEM
SERVICE CENTER

- Payroll training :
  - Additional Pay
    - 1/17/19 – 8:30 am (held at the Service Center in Madison)
    - 3/14/19 – 8:30 am (offered via Blackboard Collaborate)
  - Setting up a Person in Payroll (held at the Service Center in Madison)
    - 2/13/19 – 9:00 am
  - Approver Maintenance (offered via Blackboard Collaborate)
    - 2/14/19 – 9:00 am

- Finance training offered via Blackboard Collaborate:
  - Setting up Funding
    - 1/29/19 – 8:30 am
    - 3/11/19 – 12:30 pm
  - Changing Funding
    - 1/30/19 – 8:30 am
    - 3/12/19 – 12:30 pm
  - Direct Retro
    - 1/31/19 – 9:00 am

UNIVERSITY OF WISCONSIN SYSTEM
SERVICE CENTER

UNIVERSITY OF WISCONSIN SYSTEM
SERVICE CENTER

UW Portal Articles

- HR, Payroll, and Benefits news articles are posted to the University of Wisconsin Service Center website regularly

- The latest articles can be found at: https://uwservice.wisconsin.edu/news/

- Preview of upcoming articles:
  - W-2 (Wage and Tax Statements) Now Available – *targeted posting to coincide with availability of W-2 Forms.*
  - Income Continuation Insurance Deferred Enrollment Available Through March 1, 2019 for Eligible Employees – *targeted posting 1/22*
  - Save the Date! America Saves Week: DATES, 2019 – *targeted posting third week of January*
  - Well Wisconsin Program Incentive 2019 – *targeted posting last week January*

UNIVERSITY OF WISCONSIN SYSTEM
SERVICE CENTER

Important Year-End Payroll Dates

Date	Event
1/11/2019	Deadline to choose electronic-only distribution of your W2
1/16/2019	Target date for starting the printing of W2s
1/23/2019	Targeted date for finish printing W2s
1/30/2019	Targeted date for employees to receive 2018 W-2s
1/31/2019	IRS postmark deadline for employees 2018 W-2s
2/27/2019	Targeted print date for 2018 Fellowship/Scholarship Letters
2/28/2019	Targeted print date for 2018 1042-S forms
3/3/2019	CYE posts to WISDM (approximately)
3/11/2019	Targeted date for employees to receive 2018 1042-S forms (3/15/2019 due)

https://uwservice.wisconsin.edu/administration/cye

UNIVERSITY OF WISCONSIN SYSTEM
SERVICE CENTER