



Affinity Group 2

April 23, 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*

Agenda

- AM Absence Take with Broken Workflow
- HR Fiscal Year 2020 Department Updates
Short Work Break
Extraordinary Salary Range Review
- FI Fiscal Year End Landing Page

HRS Processing Calendar
Institutional Feedback

Absence Take with Broken Workflow

- It is possible for the workflow in HRS and the Portal to be broken for an absence take if certain steps occur.

Timeline:

- An employee using ESS submits an absence take.
- A Time Approver approves of the take.
- A Payroll Coordinator then edits the take due to a change in employee plans or an error in entry.
- Result – A take in which leave was used may not show up in the employee facing portal or may show up with 0 hours being used.

Absence Take with Broken Workflow

- **Best Practice** - An absence take submitted through ESS/MSS should be fixed through ESS/MSS.
- To resolve the issue in the previous slide the employee taking the leave should cancel the take and re-enter it with the correct information.
- Impacts of a broken workflow are limited to the absence take not being visible on the employee facing portal or displaying 0 hours instead of the true amount.

Questions?



Fiscal Year 2020 Department Updates

- Request forms and [KB-81988](#) link can be found on the Service Center website under the Organization Department Changes tile: <https://uwservice.wisconsin.edu/administration/human-resources/>
- Requests:
 - Require signatures from authorized approver(s)
 - Submit via your Affinity Group (non-Madison)
 - Submit to hris@ohr.wisc.edu (Madison only)
 - Subject “FY20 Organizational Department Request”
- UWSC can assist with large volume of changes via Mass Job Updates

Fiscal Year 2020 Department Updates

Important Factors:

- When changing Organizational Department, the following should be updated:
 - Position
 - Job
 - POI data
 - Appointment-Level funding on the Funding Data Entry page
- Position, Job Data and Funding entries for Organizational Department changes need to have Effective Date of:
 - University Staff
 - 06/23/2019 or greater
 - FA/AS/LI
 - 07/01/2019 or greater
 - POI Relationship
 - 07/01/2019 or greater

HR: Fiscal Year 2020 Department Updates

Timeline:

- Through May 17, 2019
 - Institutions: Submit Organizational Department change requests to your AG
 - UW Service Center: Make configuration changes for Organizational Departments
- May 27, 2019 through June 14, 2019
 - Institutions: Enter Position, Job, POI Organizational Department, and Funding Data Entry changes
- June 17, 2019 through June 21, 2019
 - Institutions: Final changes made on Position, Job Data, POIs, and Funding Data Entry before the Service Center can inactivate Organizational Departments.
 - UW Service Center: Identify positions, employees, POI's, still residing in Organizational Departments being inactivated, and notify Institutions to make updates
- July 1, 2019 through July 12, 2019
 - UW Service Center: Inactivate Organizational Departments identified by Institution

Short Work Break

- Short Work Break Process will run on May 24, 2019
- All Active C-basis employees will be put on Short Work Break
 - Note: The SWB process and any associated clean-up should be completed before Institutions begin entering their Organizational Department changes.

IS Extraordinary Salary Range Review

- The UW System Human Resources website includes a [UPS Implementation Toolkit](#), with a link to IS Systemwide ESRs dated 2015-16.
- Extraordinary Salary Ranges (ESRs) have been configured in HRS and take precedence over other salary grades associated with each Job Code.
- Each institution has the authority to set their ESRs at or above the ranges provided by System Administration.
- Current Academic Staff IS job codes and associated ESRs will be sent to each institution following the AG calls.
- To request a change, complete the provided HRS Template and submit via ticket to your Affinity Group.

Questions?



Fiscal Year End Landing Page

- Key Resource: Fiscal Year End Landing page <https://uwservice.wisconsin.edu/administration/fye>

2019 Fiscal Year End (HRS)



Timeline | Calendar | Resources

[Printable Calendar](#)

May 2019

May 1	Recommended earliest date to begin Fiscal Year (FY) 2020 funding entry (Funding Entry Guide)
May 10 (4pm) - 13	Budget Funding Data Entry and Direct Retro page lockout begins at 4pm for: <ul style="list-style-type: none">◦ FY 2020 Funding Load from CAT◦ Test Rollover of FY 2019 Funding to FY 2020
May 13 - 17	Campuses will receive CAT to CA and Test Funding Rollover Error Results for review
May 24	Short Work Break Job Data row inserts
May 31	Deadline to correct funding to avoid Funding Rollover errors (4pm)

June 2019

July 2019

August 2019

FI: Fiscal Year End Landing Page

Timeline **Calendar** Resources

[Printable Calendar](#)

today May 2019 < >

Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	1 Recommended earliest date to begin Fiscal Year (FY) 2019 funding entry	2	3	4
5	6	7	8	9	10 Budget Funding Data Entry and Direct Retro page lockout begins at 4pm for: - Test Rollover of FY2019 Funding to FY2020 - FY2020 Funding Load from CAT	11
12	13	14	15	16	17	18
Campuses will receive CAT to CA and Test Funding Rollover Error Results for review						
19	20	21	22	23	24 Short Work Break Job Data row inserts	25
26	27	28	29	30	31 Budget Funding Data Entry and Direct Retro page lockout for: - Funding Rollover from FY2019 to FY2020 Deadline to correct funding to avoid Funding Rollover errors (4pm)	1

FI: Fiscal Year End Landing Page

The screenshot shows a navigation menu with four tabs: 'Timeline', 'Calendar', 'Resources', and 'Communication'. The 'Resources' tab is selected and highlighted in red. Below the navigation menu, there are three main content sections: 'Contacts', 'Reference Documents', and 'KB Documents'. The 'Contacts' section lists five items, with a yellow callout bubble pointing to the first item, 'Affinity Group: ag3@uwsa.edu', containing the text 'Shows your AG team'. The 'Reference Documents' section lists two items. The 'KB Documents' section lists ten items, all with underlined text.

Timeline Calendar **Resources** Communication

Contacts

- Affinity Group: ag3@uwsa.edu Shows your AG team
- [CAT: Institutional Liaisons](#)
- [CAT: Madison Liaisons](#)
- [HR Contact Information](#)
- [System-wide Business Office Directory](#)

Reference Documents

- [Funding Entry Guide for FYE](#)
- [Compensation Administration Tool](#)

KB Documents

- [FN - Fiscal Year End Considerations](#)
- [FN - Add or Change Appointment Level Funding for Employee's Salary Expense](#)
- [FN - Salary Funding Lifecycle for Payroll Processing](#)
- [FN - Salary Funding Levels Assigned During Payroll Processing](#)
- [FN - Funding Checklist and Timelines](#)
- [FN - Enter Direct Retro Funding Distribution](#)
- [FN - Resolving Funding Error Issues](#)
- [FN - View Funding Edit Errors](#)
- [HR - CAT - Compensation Admin Tool and Additional Adjustment Pages](#)

FI: Fiscal Year End Landing Page

- Key Resource: FYE Funding Entry Guide

<https://uwservice.wisconsin.edu/docs/publications/fye-funding-entry-guide.pdf>

Fiscal Year End Funding Entry Guide
All UW Campuses
except [UW-Oshkosh](#)

Pay Run ID	Pay Basis	Pay Frequency	Pay Period Begin Date	Pay Period End Date	Funding Entry Deadline/ Final Calc Day	WISDM Journal Date	Payment Date
2019UNC07 (7M) <small>Does not cross fiscal year</small>	Annual / A-basis	Monthly	07/01/2019	07/31/2019	07/18/2019	07/18/2019	08/01/2019
2019UNC07	Summer Session S-basis	Monthly			07/18/2019	07/18/2019	08/01/2019
2019UNC07	Summer Service V-basis	Monthly	See Summer 2019 Calendars		07/18/2019	07/18/2019	08/01/2019
2019UNC07	Academic C-basis	Monthly			07/18/2019	07/18/2019	No Payment-Funding for Fringes only
2019BW07A (7A)	Hourly H-basis	Bi-weekly	06/23/2019	07/07/2019	07/11/2019	07/11/2019	07/18/2019

Funding Data Entry guidelines:

- If employee's funding source is not changing at beginning of FY2020:
 - Only one funding row is needed before Final Calc Day
 - Will be either loaded from CAT to CA, the funding rollover, or must be manually entered
 - Effective Date should match the Pay Period Begin Date for your institution (see above) for the employee's pay period that crosses fiscal years
- If employee's funding source is changing at beginning of FY2020:
 - Two funding rows are needed before Final Calc Day
 - First row will be either loaded from CAT to CA, the funding rollover, or must be manually entered. Effective Date should match the Pay Period Begin Date for your institution (see above) for the employee's pay period that crosses fiscal years.
 - Second row with the new funding source must be manually entered with a 7/1/2019 Effective Date.

Questions?



HRS Processing Calendar

← → April 2019

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
31 3C – First Prelim Calc	1 Focus Pay Card Upload 3C – Second Prelim Calc	2 3C - Prepay & Retro Loa 3C – Third Prelim Calc 3C - Payline & Retro Loa	3 3C – Fourth Prelim Calc 3C - FICA Deadline	4 3C – Final Prelim Calc	5 No Direct Retros	6
7 6:00 am - 10:00 am HRS Maintenance Outage	8	9	10	11	12	13 ACA Processing
14 Student Help Payroll Ina 4A – First Prelim Calc	15 Focus Pay Card Upload 4A – Second Prelim Calc	16 4A - Prepay & Retro Loa Ben Bill Enrollment Dea 4A – Third Prelim Calc 4A - Payline & Retro Loa ▲ collapse	17 Ben Bill Invoices Mailed 4A – Fourth Prelim Calc 4A - FICA Deadline	18 4A – Final Prelim Calc	19 Missing Leave Email - E No Direct Retros Monthly EJED Term Proc EJED Mass Job Speadsh 4M – First Prelim Calc ▲ collapse	20
21 4M – Second Prelim Cal	22 4M – Third Prelim Calc	23 4M - Prepay & Retro Loa 4M – Fourth Prelim Calc 4M - Payline & Retro Loa	24 4M – Fifth Prelim Calc 4M - FICA Deadline	25 Pending Approval Email 4A – Pay Date 4M – Final Prelim Calc Inactivate Direct Deposi ▲ collapse	26 No Direct Retros	27 + Add
28 Student Help Payroll Ina 4B – First Prelim Calc	29 No Madison Direct Retr 4B – Second Prelim Calc	30 4B - Prepay & Retro Loa No Direct Retros 4B – Third Prelim Calc 4B - Payline & Retro Loa ▲ collapse	1 Focus Pay Card Upload 4B – Fourth Prelim Calc 4M – Pay Date 4B - FICA Deadline ▲ collapse	2 4B – Final Prelim Calc	3 No Direct Retros	4 EJED Extension Proce

Questions?



Institutional Feedback

- Eau Claire
- La Crosse
- Oshkosh
- Platteville
- Stevens Point
- Whitewater