



## Affinity Group 2

### May 7, 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

- FN Funding Pages Locked  
CAT & Test Funding Rollover Results  
Dept / Position-Level Funding Effective Date
- AM Absence Enhancement Update
- PY WfAP Template Update

Upcoming Training Opportunities  
UW Portal Articles  
HRS Processing Calendar  
Institutional Feedback

# FN: Funding Pages Locked

- Budget Funding Data Entry and Direct Retro page lockout begins at 4pm on Friday, May 10, for:
  - FY2020 funding load from Compensation Administration Tool (CAT)
  - Test Rollover of FY2019 funding to FY2020
- Funding Data Entry and Direct Retro pages will be available by the end of the day Monday, May 13.

Fiscal Year End landing page:

<https://uwservice.wisconsin.edu/administration/fye>

# FN: CAT & Test Funding Rollover Results

- Institutions will receive files for review on or before Friday, May 17 regarding
  - CAT to CA load results
  - TEST Funding Rollover Errors
- Deadline to correct FY2019 funding entries to avoid Rollover Errors: May 31, 2019

Fiscal Year End landing page:

<https://uwservice.wisconsin.edu/administration/fye>

# Dept / Posn-Level Funding

Salary funding level review:

- Appointment level funding is typically used in HRS.
- Department and Position level funding entries are used as back-up funding sources only when Appointment level funding does not exist or does not cover the entire pay period.

# Dept / Posn-Level Funding Effective Date

- When manually adding or changing Department or Position level funding for FY20, the Effective Date must be **6/17/2019**.
- This allows Department or Position level funding to be used if Appointment level funding is missing for any portion of the 7A and 7M pay periods.
- This date is dependent on institutional academic calendars and will change every year.

# Dept / Posn-Level Funding Effective Date

Refer to the Funding Entry Guide on the Fiscal Year End landing page to determine correct Effective Dates for Appointment level funding entries.

For more information:

- Fiscal Year End landing page  
<https://uwservice.wisconsin.edu/administration/fye>
- KB [21728](#), Add or Change Department Level Funding for an Appointing Department
- KB [24144](#), Add or Change Position Level Funding for Employee's Salary Expense
- KB [21872](#), Salary Funding Levels Assigned During Payroll Processing

# Questions?





# AM: Absence Enhancement - Update

- New functionality was available as of May 5, 2019
  - The Prior Usage Adjustments column has been added to Projected Balances table
    - Leave that was entered, approved, and processed for a previous period after the balances were posted will appear
    - Projected balances will be updated each evening with the overnight processing
- In following example:
  - Entry for leave use prior to 4/30/19 and entered before 4/26/19 will appear in the Posted Leave Balances. This would be reflected in the Used/Adj column.
  - Entry for leave use prior to 4/30/19 and entered on or after 4/26/19 will appear in the Projected Balances. This would be reflected in the Prior Usage/Adj column.

# AM: Absence Enhancement - Update

- Following the confirm:
  - 16 hrs VN entered for prior month (April 2019)
  - 4 hrs SL used in current month (May 2019)
  - 8 hrs PH used in future month (July 2019)

Posted Leave Balances as of 04/26/2019 for Period Ending 04/30/2019 - April <span style="float: right;">i</span>						
Leave Type	Beg Earn Balance <span style="float: right;">i</span>	Earned <span style="float: right;">i</span>	Used/Adj <span style="float: right;">i</span>	Ending Earned Balance <span style="float: right;">i</span>	Available Balance <span style="float: right;">i</span>	
Vacation	97.00	14.67	0.00	111.67	141.00	
Vacation Carryover	0.00		0.00	0.00	0.00	
Sick	524.50	8.00	0.00	532.50	532.50	
Banked Leave	0.00		0.00	0.00	0.00	
Pers-Holiday	0.00	0.00	0.00	0.00	0.00	
Legal-Holiday	0.00	0.00	0.00	0.00	8.00	

  

Projected Balances for May 1 to May 31 - May as of 05/01/2019 <span style="float: right;">i</span>						
Leave Type	Prior Usage/Adj <span style="float: right;">i</span>	Beginning Balance <span style="float: right;">i</span>	Current Usage <span style="float: right;">i</span>	Current Balance <span style="float: right;">i</span>	Future Usage <span style="float: right;">i</span>	Future Balance <span style="float: right;">i</span>
Vacation	-16.00	125.00	0.00	125.00	0.00	125.00
Vacation Carryover	0.00	0.00	0.00	0.00	0.00	0.00
Sick	0.00	532.50	-4.00	536.50	0.00	536.50
Banked Leave	0.00	0.00	0.00	0.00	0.00	0.00
Pers-Holiday	0.00	0.00	0.00	0.00	-8.00	-8.00
Legal-Holiday	0.00	8.00	0.00	8.00	0.00	8.00

# PY: WfAP Template Update

- Based on institution feedback, the template for Mass File Upload for Addl Pay has been updated
- KB 85468 – PY – Additional Pay Mass Upload Process (<https://kb.wisc.edu/hrs/page.php?id=85468>)

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	EMPLID	EMPL_RCD	ERNCD	EFFDT	ADDL_SEQ	UW_END_DATE	ADDLPAY_REASON	OTH_PAY	OTH_HRS	HOURLY_RT	GOAL_AMT	SEPCHK	OK_TO_PAY	PAY_PERIOD1	PAY_PERIOD2	PAY_PERIOD3	COMMENTS
2	00000000		0 CODE	MM/DD/YYYY	1	MM/DD/YYYY		AMOUNT			AMOUNT	0	Y	Y/N	Y/N	Y/N	SAMPLE
3																	
4																	
5																	
6																	
7																	

# Questions?



# Upcoming Training Opportunities

- Payroll
  - Additional Pay
    - June 4
  - Setting Up a Person in Payroll
    - August 28
- Finance
  - Setting up Funding
    - May 7 & July 9
  - Changing Funding
    - May 8 & July 10
  - Direct Retro
    - May 9 & July 11

Register for classes and see additional course offerings on your [learning path](#)

# Upcoming Training Opportunities

- **Benefits**
  - WRS Eligibility
    - June 6
  - Eligibility and New Hire Hold
    - June 6
  - Event Maintenance and MSC Event Evaluation Report
    - June 7
- **Human Resource**
  - Intro to Hiring
    - July 30
  - Update: Person, Position, Job
    - July 31
  - Rehires, Transfers & Multiple Jobs
    - July 31

Register for classes and see additional course offerings on your [learning path](#)

# 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/>
- Recent articles:
  - Review your Beneficiary Designations
  - WRS News Online
- Upcoming articles:
  - Summer Prepay Deductions: Continuing Your Insurance Coverage During the Summer Months
  - Faculty, Academic Staff and Limited Appointees: Option to Bank Vacation in an Annual Leave Reserve Account

# HRS Processing Calendar

← → May 2019

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
28 Student Help Payroll Inacti 4B – First Prelim Calc	29 No Madison Direct Retro 4B – Second Prelim Calc	30 4B - Prepay & Retro Load No Direct Retros 4B – Third Prelim Calc 4B - Payline & Retro Load ▲ 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 Process
5	6	7 + Add	8	9 4B – Pay Date	10 CAT to CA (Process Mode - Funding and DR Page Lock	11 ACA Processing Budget Rollover (Report
12 Student Help Payroll Inacti 5A – First Prelim Calc	13 Funding and DR Page Unl 5A – Second Prelim Calc	14 Ben Bill Enrollment Deadlin 5A - Prepay & Retro Load 5A – Third Prelim Calc 5A - Payline & Retro Load ▲ collapse	15 Ben Bill Invoices Mailed Focus Pay Card Upload 5A – Fourth Prelim Calc 5A - FICA Deadline ▲ collapse	16 5A – Final Prelim Calc	17 Missing Leave Email - Emp No Direct Retros Monthly EJED Process 5M – First Prelim Calc ▲ collapse	18
19 5M – Second Prelim Calc	20 5M – Third Prelim Calc	21 5M - Prepay & Retro Load 5M – Fourth Prelim Calc 5M - Payline & Retro Load	22 5M – Fifth Prelim Calc 5M - FICA Deadline	23 Pending Approval Email to 5A – Pay Date 5M – Final Prelim Calc Inactivate Direct Deposit ▲ collapse	24 No Direct Retros Run Short Work Break Pro	25 FICA
26 Student Help Payroll Inacti 5B – First Prelim Calc	27 5B – Second Prelim Calc	28 5B - Prepay & Retro Load 5B – Third Prelim Calc 5B - Payline & Retro Load	29 5B – Fourth Prelim Calc 5B - FICA Deadline	30 No Madison DR's 5B – Final Prelim Calc	31 Funding and DR Page Lock No Direct Retros Focus Pay Card Upload 5M – Pay Date ▲ collapse	1



# Institutional Feedback

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