



Affinity Group June 25, 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

- BN New Enrollment Code/Reason
- HR Reports To WED Reports
- PY Overpayment Recovery Process
- TL New Public Query
- UW SHR WRS Lump Sum Rate
- PD Upcoming Classes

UW Shared Services Branding Transition
Service Center Employment Opportunity
Institutional Feedback

BN: New Enroll Code/Reason

- NEW Enrollment Code/Reason coming 7/1
- Change Benefit Plan – Late It's Your Choice
- Only for Service Center use
- Used to track approved appeals

BenAdmin Data Entry

Event / Participant Selection | **Option Election** | Dependents / Beneficiaries

Sched ID EV19 Empl ID [REDACTED] Ben Record 0 Event ID 4

Event Data 05/01/2019 Administrative Excess Credit Rollover To Cash

Enrollment Code: Change Benefit Plan ▼ **Enrollment Reason:** Late It's Your Choice ▼ App Received: [] 31 [Apply enrollment defaults](#)

▼ Available Plans and Options ? [Find](#) 1-17 of 17

Questions?



WED Reports

- **Functionality within HRS uses the Reports To Field**
 - WfAP, Travel Reimbursement, ePerformance, etc
- **WED Reports will be available on July 1 to assist institutions with Reports To cleanup and maintenance**
- **New WED Reports**
 - Position Reports to Self
 - Missing Reports To
 - Reports To Vacant
 - Reports To Conflict (Position data and Job)

Position Reports to Self

- Filled positions where the “Position Number” is the same as “Reports To” Position Number
- Displays for all institutions

WED Reports

Missing Reports To

- Filled positions with missing “Reports To”
 - Report Requested by UW Superior, UW Stout, UW Parkside, UW Madison, UW Oshkosh, UW Whitewater
 - Primary Criteria
 - Employee Class = FA, AS, LI, ET1, ET2, CP, CJ
 - Excludes Summer Session, Summer Service and NON pay groups
 - Reports To is blank

Reports To Vacant

- Filled positions where “Reports To” value is a vacant Position
 - Report Requested by UW Superior, UW Stout, UW Parkside, UW Madison, UW Oshkosh, UW Whitewater
 - Primary Criteria
 - Employee Class = FA, AS, LI, ET1, ET2, CP, CJ
 - Excludes Summer Session, Summer Service and NON pay groups
 - “Reports to” is not blank

Reports to Conflict

- Filled positions where Reports To is different than incumbent's job
 - Report Requested by UW Superior, UW Stout, UW Parkside, UW Madison, UW Oshkosh, UW Whitewater
 - Primary Criteria
 - Employee Class = FA, AS, LI, ET1, ET2, CP, CJ
 - Excludes Summer Session, Summer Service and NON pay groups
 - Position Data “Reports To” is not same as Incumbent’s Job Data “Reports To”

WED Reports

Security roles associated with “Reports To” WED reports.

- UW_UNV_HR_ADMINISTRATOR (HR Administrator (Update HR))
- UW_UNV_HR_JOB_DATA_UPD (HR Job Data Update)
- UW_UNV_HR_POSITION_UPD (HR Position Update)

Reference KB-90250 (Available July 1)

Reports To Workflow Exception Dashboard

Workflow Exception Dashboard



Hello Ramesh, you have claimed 0 and completed 0 errors.

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

View All | | First 1-11 of 11 Last

Error ID	Priority	Error Desc	Module	Total Errors
1 UW_HR_MISSING_ADJ_CONTINUOUS_SVC_DT	High	Employee is missing Adjusted Continuous Service Dt	HR	26
2 UW_HR_MISSING_BUSINESS_ADDRESS	Low	Employee has a missing or incomplete business address	HR	6
3 UW_HR_MISSING_HOME_ADDRESS	Low	Missing a Home or Mailing Address	HR	28
4 UW_HR_MISSING_SSN	Medium	Employee has invalid or missing SSN	HR	65
5 UW_HR_NEW_HIRE_HOLD	High	New Hire Hold - Missing Job Data	HR	20
6 UW_HR_OVERMAX_UNDERMIN	Medium	Employees with over the maximum or under the minimum salaries that have not been reviewed.	HR	192
7 UW_HR_POSITION_MISSING_REPORTS_TO	Medium	Filled positions missing Reports To	HR	2745
8 UW_HR_POSITION_REPORTS_TO_CONFLICT	Medium	Filled positions where Reports To is different than incumbent's job	HR	48
9 UW_HR_POSITION_REPORTS_TO_SELF	High	Filled positions where the Position Nbr is the same as Reports To	HR	21
10 UW_HR_POSITION_REPORTS_TO_VACANT	Medium	Filled positions where Reports To value is a vacant position	HR	1036
11 UW_HR_UNC_NO_DEFAULT_SCHED	Medium	Unclassified employee without a default schedule; current schedule like ZERO	HR	11

Batch Run Date: 06/06/2019

Questions?

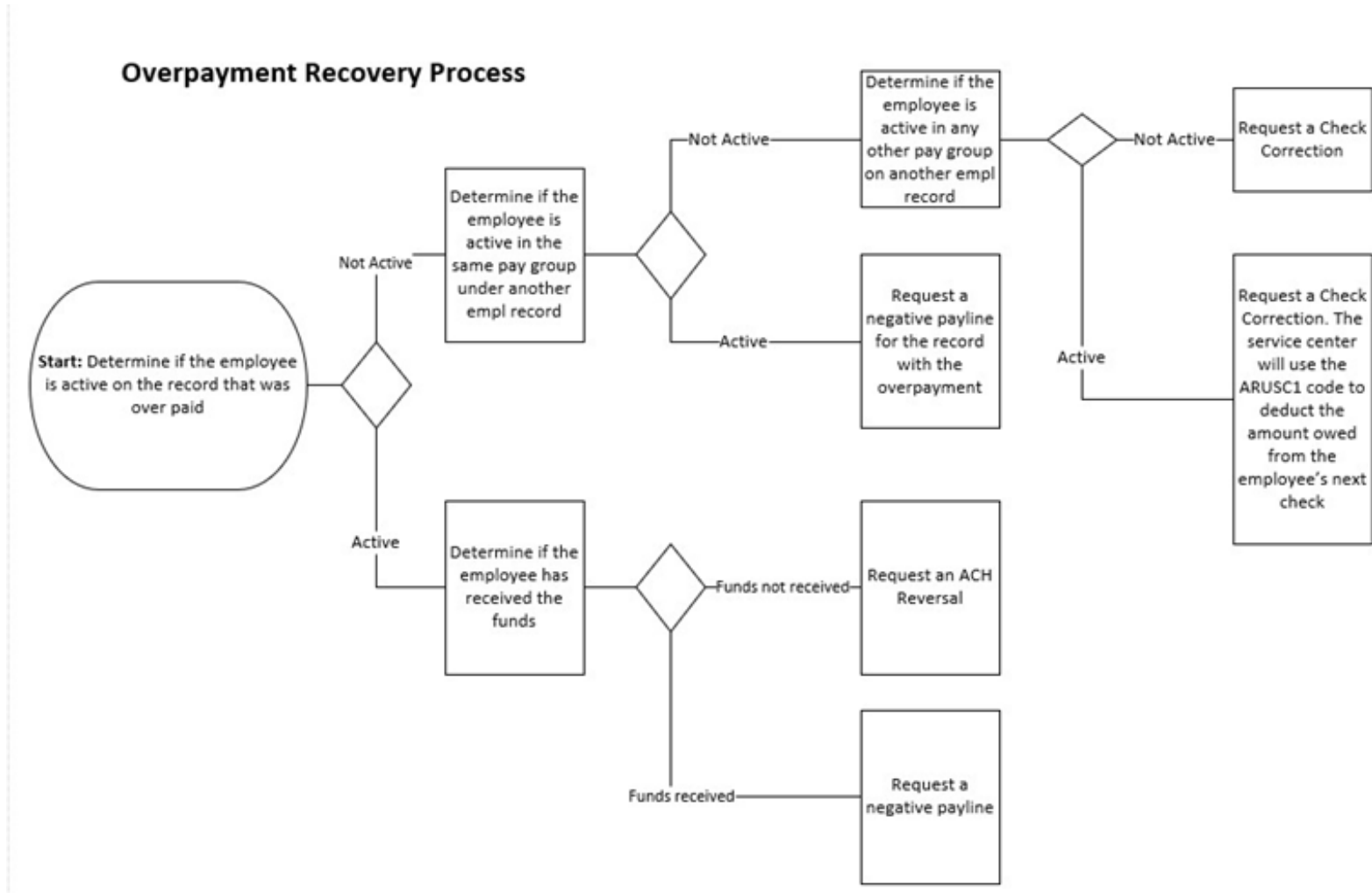


PY: Overpayment Recovery Process

- Definition of an Overpayment
 - Overpayment of Gross Wages
 - Overpayment of Net Wages due to any deductions not taken out
 - Over-used leave upon job termination
- Methods for correction of Overpayments
 - On-cycle preferred
 - Negative Payline
 - Negative WfAP
 - ACH Reversal (limited use)
 - Check Correction

PY: Overpayment Recovery Process

- An Overpayment has occurred. Which method do you use?



PY: Overpayment Recovery Process

- Negative Payline/WfAP Request
 - Use if an employee is active in the same paygroup as the Overpayment.
 - Requests can be applied to more than one on-cycle payment (i.e. "payment plan").
 - Must provide: Empl ID, Empl Record, Amount, Earnings Code and Earnings Dates (Template available at Service Center website).
 - Must be for the **Gross** amount overpaid, **not the Net**

PY: Overpayment Recovery Process

- ACH Reversal
 - Limited use: Overpayments that cannot be reasonably recouped via a negative payline or check correction.
 - Requests should be completed on or prior to the pay date.
 - Requests after the pay date will be reviewed by the Service Center payroll staff to determine if an ACH Reversal is possible.
 - Submit a ticket to request an ACH reversal.

PY: Overpayment Recovery Process

- **Check Correction**

- Use if an employee is inactive and will not have future earnings.
- Use if an employee is active but a negative payline request is not an option because the active empl record is in a different pay group.
 - The Service Center will use an accounts receivable deduction on the employee's next on cycle check.
- Use if the Overpayment does not meet the ACH reversal criteria.
- Form must be completely filled out including the “was” and “should be” sections.
- Submit this form to the Service Center to calculate the exact amount due before recouping money from the employee.
- Check Corrections not paid in full by the end of the current tax year must be recalculated for Federal and State tax adjustments.

PY: Overpayment Recovery Process

Additional Information:

- Check Correction form:

<https://uwservice.wisconsin.edu/administration/check-correction>

- Check Correction KB-27632
- Negative Payline Request KB-19084
- WfAP KB-17094
- WfAP Tipsheet:
<https://uwservice.wisconsin.edu/docs/pd/add'l-pay-job-aid-custom2018092430714.pdf>
- ACH Reversals KB-21590

Questions?



TL: New Public Query

- UW_TL_NO_TL_SECURITY – Employees with no TL Security will be available on July 1, 2019.

Query										Personalize	Find	View All	First	1 of 1	Last
Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites						
UW_TL_NO_TL_SECURITY	Employees with no TL Security	Public	UNV_TL_BUSPROC	HTML	Excel	XML	Schedule	Lookup References	Favorite						

- This query is an addition to the current WED report also named UW_TL_NO_TL_SECURITY. This query will search both Hourly (H) and Monthly (S) employees.
- Coordinators can use this query to identify and create needed TL Security pages.
- Monthly employees need TL Security pages for Summer leave reporting, WfAP, etc.

UW_TL_NO_TL_SECURITY - Employees with no TL Security

Dept ID

Empl Type Enter H (Hourly) or S (Salary)

- Reference KB-20530

Questions?



Wisconsin Retirement System (WRS) - Lump Sum Rate

- Lump Sum Rate
 - HRS uses a default hourly rate in the absence of a reported hourly rate.
 - **Effective 7/1/2019 the updated default rate is \$29.80.**
- Historic Lump Sum Rates:

Effective	Rate
7/1/2018	\$29.17
7/1/2017	\$28.81
7/1/2016	\$28.60

- For more information on WRS, go to the [WRS page](#). Additional information on WRS lump sum rates can be accessed on the [administrator's website](#).

Questions?



PD: Upcoming Classes

- Payroll
 - Setting Up a Person in Payroll
 - August 28
- Finance
 - Setting up Funding
 - July 9
 - Changing Funding
 - July 10
 - Direct Retro
 - July 11

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

PD: Upcoming Classes

- Benefits
 - Eligibility and New Hire Hold
 - July 18
 - Event Maintenance and MSC Event Evaluation Report
 - July 18
- Human Resource
 - Intro to Hiring
 - July 30
 - Update: Person, Position, Job
 - July 31
 - Rehires, Transfers & Multiple Jobs
 - July 31

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UW-Shared Services Branding Transition

- Service Center is now a part of UW Shared Services
 - Branding transition is underway
 - Focus is on internal items, there will be some exceptions
 - Target date is July 31st
- Larger impact items:
 - HRS Administration Page
 - KnowledgeBase Documents
 - AG Slides
 - Training/Help Resources
 - Benefits Forms

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This logo, as well as the color schematics, will be used in upcoming templates, forms and pages

Service Center Employment Opportunity

- The Service Center is recruiting for two generalists positions and looking for talented new teammates.
- For more information about our Generalist positions click [Business Process Generalist](#)
- Help us cast a wide recruiting net and share this information with your professional networks and friends who may be interested.

Questions?



Institutional Feedback

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