Campus Call

April 6, 2021

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Agenda

- New Person Checklist

- Outside Activity Report WED & Queries

- MSS Dashboard Enhancement

- Benefit Mail Query

- Split Benefits Deduction

- Single Payroll Communication

New - Person Checklist

The Person Checklist is new functionality to provide an area in HRS to enter important dates at an employee level.

- Person Checklist includes:
  - Campus Seniority Date
  - Person of Interest – Criminal Background Check & Position of Trust

- Person Checklist was available on April 5, 2021
  - KB 109874 - Creating Person Checklist

- If there are other dates campuses would like included on the Person Checklist, submit a request to serviceoperations@uwss.wisconsin.edu.

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Checklist Matrix

Checklist Code	Checklist Code Description	Checklist Item Code	Checklist Item Description	Applicant Checklist	Person Checklist	Person Assignment Checklist
UWPREC	Pre-Onboarding	UWCBC	Criminal Background Check	√		
UWPREC	Pre-Onboarding	UWSHRC	Sexual Harassment Reference Check	√		
UWPREC	Pre-Onboarding	UWPOTN UWPOTY UWPOT2 UWPOT4	Position of Trust = No Position of Trust = Yes Position of Trust = 2 Year Renew Position of Trust = 4 Year Renew	√		
UWDATE	Dates	UWCBC	Criminal Background Check			√
UWDATE	Dates	UWSHRC	Sexual Harassment Reference Check			√
UWDATE	Dates	UWPOTN UWPOTY UWPOT2 UWPOT4	Position of Trust = No Position of Trust = Yes Position of Trust = 2 Year Renew Position of Trust = 4 Year Renew			√
UWPOI	POI Dates	UWxBCN	POI CBC – POT No Recheck		√	
UWPOI	POI Dates	UWxBC2	POI CBC – POT 2 Year Recheck		√	
UWPOI	POI Dates	UWxBC4	POI CBC – POT 4 Year Recheck		√	
UWSNDT	Seniority Dates	UWxCSD	Campus Seniority Date		√	

x = Campus Letter; POT = Position of Trust

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Campus Seniority Date – Add via Person Checklist

- **Navigation:** Workforce Administration > Personal Information > Organizational Relationships > Person Checklist
  - Checklist Code = UWSNDT
  - Checklist Item Code = UWxCSD (x = Campus Letter)

Person Checklist

		Person ID				

Checklist History Find | View All First ◀ 1 of 1 ▶ Last

*Checklist Date 09/08/2018 📅 ＋ －

*Checklist UWSNDT 🔍 Seniority Dates

Comment [   ] 🔲✔

Person Checklist Items Personalize | Find | 🔲 | 🔲 First ◀ 1 of 1 ▶ Last

*Sequence	*Item Code	Description	*Status	*Status Date		
1	UWCCSD 🔍	UWEAU Campus Seniority Date	Completed ▾	09/08/2018 📅	＋	－

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Person of Interest CBC – Add via Person Checklist

- **Navigation**: Workforce Administration > Personal Information > Organizational Relationships > Person Checklist
  - Checklist Code = UWPOI
  - Checklist Item Code = UWxBCN, UWxBC2, UWxBC4 (x = campus letter code)

Person Checklist

			Person ID		

Checklist History   Find | View All   First ◀ **1 of 1** ▶ Last

*Checklist Date 03/22/2021 📅

*Checklist UWPOI 🔍 Person of Interest (POI) Dates

Comment

Person Checklist Items   Personalize | Find | 🔲 | 🏷   First ◀ **1-3 of 3** ▶ Last

*Sequence	*Item Code	Description	*Status	*Status Date	
1	UWCBCN 🔍	UWEAU POI CBC - No Recheck	Completed ▾	09/01/2000 📅	➕ ➖
2	UWABC2 🔍	UWMSN POI CBC - 2 Year Recheck	Completed ▾	09/21/2020 📅	➕ ➖
3	UWBBC4 🔍	UWMIL POI CBC - 4 Year Recheck	Completed ▾	03/22/2021 📅	➕ ➖

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Mass Load Available for
Person & Person Assignment Checklists

- KB 107801-Mass Load Process for Person Checklist and Person Assignment Checklists in HRS
  - Request via serviceoperations@uwss.wisconsin.edu
  - UWSS will provide a Mass Load Template for the specific checklist and selection requested along with the fields required to be populated
  - Campus will return populated template back to UWSS
  - UWSS will load the data from the template into HRS
  - Results from the Mass Load will be sent to requestor

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Checklist WED Reports

The following reports identify when a checklist code is used on the wrong checklist:

- **UW_HR_PER_CHKLST_INCORRECT** – Incorrectly assigned checklist codes on Person Checklist

- **UW_HR_EMP_CHKLST_INCORRECT** – Incorrectly assigned checklist codes on Person Assignment Checklist

Checklist Queries

Navigation: Reporting Tools > Query > Query Viewer

- **UW_HR_CHECKLIST_BY_ID** – shows all dates for an employee (Person Checklist and Person Assignment Checklist) Prompt by EMPLID (EMPL_RCD optional).

- **UW_HR_CHECKLIST_BY_DT** – shows dates for Criminal Background Check, Position of Trust, Sexual Harassment Reference Check and Campus Seniority Date. Prompts include Business Unit, Dept ID, and Job Effective Dates.

- **UW_HR_POI_CHECKLIST_BY_DT** – shows dates on the Person Checklist for POI Criminal Background Check and Position of Trust. Prompts include Business Unit, Dept ID, and Effective Dates.

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Outside Activity Report WED and Queries

- Outside Activity Report (OAR) began on April 1, 2021. A WED and queries have been created to assist in monitoring OAR for institutions who are participating in this service.

- UW_HR_OAR_NEED_APRVL (WED and Query)
  - Lists employees who have submitted an Outside Activity form for 2020 and approval of the activity reported is needed by the Reports To/Reviewer.

- UW_HR_OAR_FORM_DATA (Query)
  - Lists employees who have submitted the OAR and have listed outside activities.

Outside Activity Report WED and Queries

- UW_HR_OAR_FORM_NO_ACTVTY (Query)
  - Lists employees who submitted the OAR and checked "No outside activity".

- UW_HR_OAR_FORM_NOT_SBMT (Query)
  - Lists employees who have not submitted the OAR, including those that have clicked Save but not Submit.

- Security Role needed to access the queries:
  - UW_UNV_HR_OAR_QRY

- Resources:
  - KB 98272 – OAR Reports – WED and Queries in HRS

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MSS Dashboard Enhancement – Pending Approvals

- A checkbox has been added to View All Pending Approvals, including pending approvals outside the current date range criteria.
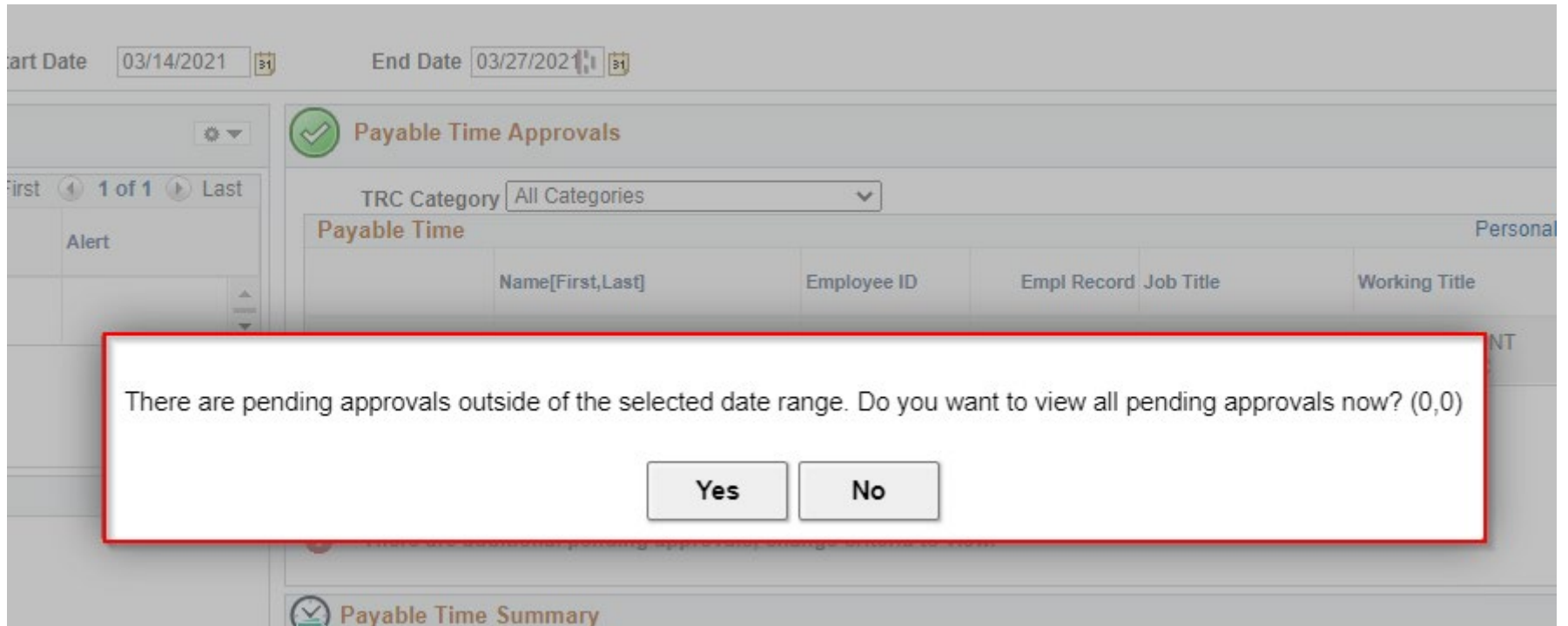
MSS Dashboard Enhancement – Pending Approvals

- Checking the new View All Pending Approvals box will populate the Payable Time Approvals pagelet with all pending approvals.

MSS Dashboard Enhancement – Pending Approvals

- If the check box is not checked and employees have pending time outside the date range, a pop-up will appear asking if the user would like to view the additional time to approve.

MSS Dashboard Enhancement – Pending Approvals

- Clicking 'Yes' will populate the Payable Time Approvals pagelet with all pending approvals.
- Clicking 'No' will only display approvable time in the specified date range.

New - Benefit Mail Query

Tools available to identify communications that have been sent to employees.

- UW_BN_EMAIL is a public query created for benefit administrators to see all emails sent on a particular day for their institution.
  - For more information see: KB 109841

- Mail Retrieval Page allows benefit administrators to search for all emails that were sent to a specific employee.
  - For more information see: KB 109416

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Split Benefits Deductions Reconciliation

Benefits will still be taken one month in advance.

- Example: 4A and 4B deductions will pay for May coverage

- When an employee terminates a reconciliation will determine how much of a refund they may receive.
  - Example: If an employee terminates on 4/16/2021 (middle of 4B pay period), they will have had deductions taken on the 4A payroll for half of May premiums. These premiums should be refunded on the 4B payroll via benefit retro.
  - An employee will most likely not owe money for premiums unless premiums are missed on a paycheck prior to their termination.
- Effective dates for lapse in coverage due to unpaid LOA is still under review.

Split Benefits Deductions

- Craftworkers will have a premium holiday due to the implementation of Split Benefits Deductions.
  - No deductions will be taken on the April 8, 2021 paycheck (3B payroll)
  - A communication was sent to the affected population on April 1, 2021

Single Payroll Communication Timeline

January
- Email Communication to HR Directors: Complete – 1/12
- HR Admins Campus call (communication strategy): Complete – 1/12
- Complete informational web site for employees: Complete - Week of 1/18
- Send employee biweekly and monthly mailers: Complete – 1/25
- Send employee biweekly and monthly email communications: Complete - 1/26
- MyUW Portal Article: Target: Complete 1/27

February
- MyUW Portal Article: Complete - 2/8
- HR Admins Campus Call (encourage campuses to repost portal article to other institutional channels): Complete – 2/9
- Employee Town Hall for Split Benefits Deductions: Complete – 2/16
- Budget Seminar for Employees: Complete - 2/23

March
- Employee Town Hall for Single Payroll: Complete – 3/3
- MyUW Portal Article: Complete - 3/8
- HR Admins Campus Call (encourage campuses to repost portal article to other institutional channels): Complete – 3/9
- Present at Joint Governance: Complete – 3/19
- Budget Seminar for Employees: Complete - 3/24

April
- Direct communication to Craftworkers: Complete – 4/1
- MyUW Portal Article: Target - 4/5
- HR Admins Campus Call (encourage campuses to repost portal article to other institutional channels): Target – 4/6
- Direct communication to biweekly employees (minus Craftworkers): Target - 15
- Budget Seminar for Employees: Scheduled – 4/27

May
- MyUW Portal Article: Target - 5/3
- HR Admins Campus Call (encourage campuses to repost portal article to other institutional channels): Target – 5/4
- Employee Town Halls for Single Payroll: Scheduled – 5/4, 5/13 & 5/17
- Budget Seminar for Employees: Scheduled – 5/12

June
- MyUW Portal Article: Target - 6/7
- HR Admins Campus Call (encourage campuses to repost portal article to other institutional channels): Target – 6/8
- Targeted Communications to Employees for WDC/TSA, W4 and direct deposit additional flat dollar, other general deductions: TBD
- Budget Seminar for Employees: Scheduled – 6/22

July
- Run/distribute reports to campuses to identify employees who have not updated their deductions: date TBD

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Single Payroll Employee Communications

- A MyUW Portal article was posted on April 5, 2021 regarding Single Payroll.
  - We encourage campuses to re-post or link the portal article on campus websites, newsletters, Facebook pages, etc.

- We recommend linking the following resources on campus websites:
  - Biweekly/Split Benefits Deductions Landing Page ([link](#))
  - Monthly/Single Payroll Landing Page ([link](#))

Questions?