# Campus Call

April 27, 2021

# Agenda

- Telecommuting Agreement Form
- Funding Pages
- Fiscal Year End Pages
- Fiscal Year End Funding Guide
- eBenefits File
- HRS Security Role Provisioning Template
- FY2022 Organizational Dept Updates

UNIVERSITY OF WISCONSIN SYSTEM

# Telecommuting Agreement Form

A new Telecommuting Agreement Form (Telework eForm) will be available in the portal on Monday, May 3, 2021 and is available for all employees who are eligible to telecommute. This does not include UW Madison employees.

Employees should work with their supervisor to verify they are eligible for telecommuting prior to filling out the form.

Employees will be able to:
- Submit a new form
- Update their submitted form before it is approved
  - After supervisor approval, any changes will require a new form.
- View their submitted and approved form

Supervisors will be able to:
- Approve a form
- Push back the form to the employee for updates and resubmission
  - Supervisors cannot update information on the form

When an employee submits a telecommuting form, it will be routed to their supervisor (Reports To on Job Data) for review and approval, if eligible.
- If the employee's supervisor is on a Paid or Unpaid Leave of Absence, the workflow will include the supervisor and who they report to (on Job Data).

# Telecommuting Agreement Form

- Telework eForm includes the following information:
  - Telecommuting Work Hours and Designated Workplace
    - Work Location and Office Description
    - Telecommuting Schedule – On and Off Site
    - Workplace Expectations
  - Communication Expectations
  - Travel Status and Expenses
  - Telecommunications and Equipment Costs
    - VoIP phone vs. non VoIP phone
    - Internet Services
    - Office and Computer Equipment
  - Confidentiality of Data & Record Management
  - Telecommuting Safety & Ergonomic Checklists

UNIVERSITY OF WISCONSIN SYSTEM

# Telecommuting Agreement Form

**UNIVERSITY OF WISCONSIN SYSTEM**

- Telecommute Landing Page
- New Telework eForm
- Update a Telework eForm
- View a Telework eForm
- Approve a Telework eForm

**Welcome to the Telecommuting Agreement Form page!**

Before completing this agreement, confirm your position is eligible for telecommuting.

Tabs on the left of this pane can be used to create, update, view or approve Telecommuting Agreement eForms.

**Requesters**:

- **New Telework eForm** - start a new form
  - All five acknowledgements must be marked Yes before your request will be accepted.
  - Review your contact addresses in Employee Self Service before beginning this form (tipsheet). If updates are needed and you do not have access to make changes, send your updates to your Human Resources office.

- **Update a Telework eForm** - change a form you created that is not yet approved
  - Note: Any changes to an approved request require a new form.

- **View a Telework eForm** - view all requests you have created

**Approvers**:

- **View a Telework eForm** - view completed agreements for employees that report to you

- **Approve a Telework eForm** - take action on any requests awaiting your approval

**Resources**:

Tipsheets

UW System Administrative Policies (full list)

- SYS 1228 Telecommuting [coming soon]

- SYS 1000 Information Security: General Terms and Definitions

- SYS 1031 Information Security: Data Classification and Protection

- SYS 1035 Information Security: IT Asset Management

- SYS 1040 Information Security: Privacy Policy

- SYS 1230 Workplace Safety

**UNIVERSITY OF WISCONSIN SYSTEM**

# Telecommuting Agreement Form

- HR Administrators will be able to view submitted and completed Telework eForms
  - HRS Path: Fluid Home > Employee Self Service > Personal Details > Telecommuting Agreement > View a Telework eForm
  - Security Role = UW_UNV_HR_ADMINISTRATOR

- Reports and Queries are currently being developed and will be introduced as they become available

- Resources
  - Employee Tip Sheet
    - https://uwservice.wisconsin.edu/help/personal-information/#resources
  - Approver Tip Sheet
    - https://uwservice.wisconsin.edu/docs/publications/hr-employee-telework-approver.pdf
  - KB 101384 – Reviewing and Approving eForms in HRS
    - https://kb.uwss.wisconsin.edu/page.php?id=101384
  - UW System Policy 1228 – Telecommuting (pending)
  - Manager Guidelines is being prepared by UW System HR

UW UNIVERSITY OF WISCONSIN SYSTEM

# Funding Pages

Budget Funding Data Entry and Direct Retro page

lockout begins at 4pm on Friday, May 7, 2021 for:

- FY2022 Funding load from Compensation Administration Tool (CAT)
- Test Rollover of FY2021 Funding to FY2022

Funding Data Entry and Direct Retro pages will be available by the end of the day Monday, May 10, 2021.

Fiscal Year End landing page:
https://uwservice.wisconsin.edu/administration/fye

# Fiscal Year End Landing Page

- Key Resource: Fiscal Year End Landing page
  https://uwservice.wisconsin.edu/administration/fye
- 2021 Fiscal Year End (HRS)

| Timeline | Calendar | Resources |
| --- | --- | --- |

Printable Calendar

### May 2021

| MAY 1 | Recommended earliest date to begin Fiscal Year (FY) 2022 funding entry (Funding Entry Guide) |
| --- | --- |
| MAY 7 (4:00 PM) - 10 | Budget Funding Data Entry and Direct Retro page lockout for:<br>- FY2022 Funding Load from CAT<br>- Test Rollover of FY2021 Funding to FY2022 |
| MAY 10 - 14 | Campuses will receive CAT to CA and Test Funding Rollover Error Results for review |
| MAY 22 (2:00 AM) | Short Work Break Job Data row inserts |
| MAY 28 | Deadline to correct funding to avoid Funding Rollover errors (4pm) |
| MAY 28 (4:00 PM) - JUNE 3 | Budget Funding Data Entry and Direct Retro page lockout for:<br>- Funding Rollover from FY2021 to FY2022 |

### June 2021

### July 2021

### August 2021

# Fiscal Year End Funding Entry Guide

| Pay Run ID | Pay Basis | Pay Frequency | Pay Period Begin Date | Pay Period End Date | Funding Entry Deadline/ Final Calc Day | WISER Journal Date | Payment Date |
|---|---|---|---|---|---|---|---|
| 2021UNC07 (7M) Does not cross fiscal year | Annual / A-basis | Monthly | 07/01/2021 | 07/17/2021 (Prorate pay-conversion to biweekly) | 07/15/2021 | 07/15/2021 | 07/30/2021 |
| 2021UNC07 | Summer Session S-basis | Monthly | See Summer 2021 Calendars | | 07/15/2021 | 07/15/2021 | 07/30/2021 |
| 2021UNC07 | Summer Service V-basis | Monthly | | | 07/15/2021 | 07/15/2021 | 07/30/2021 |
| 2021UNC07 | Academic C-basis | Monthly | | | 07/15/2021 | 07/15/2021 | No Payment- Funding for Fringes only |
| 2021BW07A (7A) | Hourly H-basis | Bi-weekly | 06/20/2021 | 07/03/2021 | 07/08/2021 | 07/08/2021 | 07/15/2021 |

Funding Data Entry guidelines:
1. If employee's funding source is not changing at the beginning of FY2022:
   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
2. If employee's funding source is changing at the beginning of FY2022:
   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 7/1/2021 Effective Date.

# Fiscal Year End Funding Entry Guide
# UW Oshkosh Only

| Pay Run ID | Pay Basis | Pay Frequency | Pay Period Begin Date | Pay Period End Date | Funding Entry Deadline / Final Calc Day | WISER Journal Date | Payment Date |
|---|---|---|---|---|---|---|---|
| 2021UNC06 (6M)<br>Does not cross fiscal year | Annual / A-basis | Monthly | 06/01/2021 | 06/30/2021 | 06/17/2021 | 06/17/2021 | 06/30/2021 |
| 2021UNC06 | Summer Session S-basis | Monthly | 06/05/2021 | 07/02/2021 | 06/17/2021 | 06/17/2021 | 06/30/2021 |
| 2021UNC06 | Summer Service V-basis | Monthly | 06/05/2021 | 07/04/2021 | 06/17/2021 | 06/17/2021 | 06/30/2021 |
| 2021UNC06 | Academic C-basis | Monthly | 06/05/2021 | 07/03/2021 | 06/17/2020 | 06/17/2020 | No Payment- Funding for Fringes only |
| 2021BW07A (7A) | Hourly H-basis | Bi-weekly | 06/20/2021 | 07/03/2021 | 07/08/2021 | 07/08/2021 | 07/15/2021 |

Funding Data Entry Guidelines for S,V, and C-Basis Employees for 6M payroll
   Fiscal Year 2022 funding, with an effective date of 7/1/2021, must be entered by the final calc on 6/17/21 for:
   - S-Basis employees with a hire date of 7/2/21 or earlier
   - V-Basis employees with a hire date of 7/4/21 or earlier
   - C-Basis employees with a hire date of 7/3/21 or earlier (to supply fringe funding)

Funding Data Entry Guidelines for H-Basis Employees for 7A biweekly payroll
   1. If employee's funding source is not changing at the beginning of FY2022:
      Only one funding row is needed before 7A Final Calc Day
      - Will be either loaded from CAT to CA, the funding rollover, or must be manually entered
      - Effective Date must be 6/20/21
   2. If employee's funding source is changing at the beginning of FY2022:
      Two funding rows are needed before 7A Final Calc Day
      - First row will be either loaded from CAT to CA, the funding rollover, or must be manually entered. Effective Date must be 6/20/2021.
      - Second row with the new funding source must be manually entered with a 7/1/2021 Effective Date.

# eBenefits File

- eBenefits File has been created to align with moving employee personnel and benefit information into HRS
- The functionality will be available starting, Monday, May 3, 2021
- eBenefits File is located on the Electronic Files tab in Modify a Person
  - Workforce Administration > Personal Information > Modify a Person
  - Workforce Administration > Personal Information > Biographical > Modify a Person

# eBenefits File

- Security Roles needed for access to eBenefits File:
  - UW_UNV_BN_VIEW
    - View Only Access to documents
  - UW_UNV_BN_CAMPUS_BN_UPD
    - Add, Delete Request, View, Edit, and Reassign documents
  - UW_UNV_HR_BFILE_RESTRICTED2 (limited)
    - Add documents for ePFile restricted files only
      - President
      - Report directly to the President
    - If the file is not restricted and the user does not have any other role for Benefits File, the user will not be able to access any non-restricted files.

UNIVERSITY OF WISCONSIN SYSTEM

# eBenefits File

- Folder options in eBenefits File
  - Health and Supplemental Insurances
    - State Group Health
    - Delta Dental
    - Delta Vision
  - Accident, Life and Disability Insurances
    - Accident Insurance
    - Accident Death & Dismemberment (AD&D)
    - State Group Life
    - Individual & Family Life
    - UW Employees Inc Life (UWE)
    - Income Continuation Insurance (ICI)
  - Flexible Spending Accounts
    - FSA Medical
    - FSA Dependent Care
    - Health Savings Plan
  - Savings/Retirement Accounts
    - EZ Enrollment Forms for TSA
    - Salary Reduction Agreements
    - WRS Additional Contribution Forms
  - Miscellaneous
    - Lack of SSN Affidavit
    - Insurance Selection Form for Leave of Absence
    - Sick Leave Certification

UW UNIVERSITY OF WISCONSIN SYSTEM

# eBenefits File

- For campuses participating in Benefits Service Delivery
  - Benefits Service Delivery Team will upload all completed applications to the Benefits File
- For campuses that do not participate in Benefits Service Delivery
  - State Group Health applications should be uploaded to the employee's Benefits File instead of faxing/emailing/mailing completed applications
  - Please upload applications within seven days of entry in HRS to ensure the document is available if needed for processing with ETF
  - If you do not have an electronic storage for Benefits file, we recommend using the Benefits file in HRS

UNIVERSITY OF WISCONSIN SYSTEM

# eBenefits File

- Resources:
  - KB 93451 – Using the Electronic File Feature in HRS
    - Includes Naming Convention

# HRS Security Role Provisioning Template

- The ability to create role templates for security provisioning is now available in HRS.

- A security role template allows for the request of a collection of roles vs. selecting roles one by one.

  - Example: Create a template for core security roles used by the HR team.

- Once a template has been chosen, security roles can be added and removed for an individual.

UNIVERSITY OF WISCONSIN SYSTEM

# HRS Security Role Provisioning Template

- Security Role: UW_UNV_CT_PROV_ROLE_TMPLT (UW Prov Campus Template Create)

- Requesters will only see templates created by their institution.

Resources:

- KB 101376 - Create and Modify Security Role Templates in HRS

# FY 2022 Organizational Dept Updates

To add new Organizational Departments (Org Depts) to HRS, change their description, or inactivate Org Depts for FY2022 in HRS, request forms and the KB document are found on the Service Operations website at HRS Administration > Human Resources > Organization Department Changes tile:

- https://uwservice.wisconsin.edu/administration/human-resources/

Requests:

- Require signatures from authorized approver(s)
- Submit to serviceoperations@uwss.wisconsin.edu (non-Madison)
- Submit to hris@ohr.wisc.edu (Madison only)
- Email subject line: "FY22 Organizational Department Request"

Service Operations will provide listings of employees and POIs in impacted departments

- Service Operations can assist with large volume of changes via Mass Job Updates
  - Submit to serviceoperations@uwss.wisconsin.edu
  - Email subject line: "Organizational Department Mass Job Update"

# FY 2022 Organizational Dept Updates

Important Factors:

When changing Organizational Department, Institutions will need to update:
- 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
    - Sunday, June 20, 2021 or greater
- FAASLI
    - Thursday, July 1, 2021 or greater
- POI Relationship
    - Thursday, July 1, 2021 or greater

UNIVERSITY OF WISCONSIN SYSTEM

# FY 2022 Organizational Dept Updates

Timeline:

Through, Friday, May 14, 2021

- Institutions: Submit FY2022 Organizational Department (Org Dept) change requests to Service Operations (i.e., add new Org Dept, change Org Dept description, inactivate Org Dept)
- Service Operations: Make requested Org Dept changes in HRS

Monday, May 24, 2021 through Friday, June 11, 2021

- Institutions: Enter Position, Job, POI and Funding Data Entry Org Dept changes for employees and POIs into HRS

Thursday, July 1, 2021 through Friday, July 16, 2021

- Service Operations: Inactivate in HRS the Org Depts identified by Institution

# Save The Date

- The Campus Call on Tuesday, May 4, 2021 will have an agenda of Single Payroll
  - Policy 230 Changes
  - Job Entry Timelines
  - Payroll Process Timeline Changes
  - Additional Pay
  - General Deductions
  - Missed Payroll Criteria Changes
  - FAASLI Leave Reporting
  - Payroll Processing Considerations

# Questions?