



INSTITUTION ADMINISTRATOR CALL

April 25, 2024



AGENDA

- Portal Articles
- Upcoming Employee Emails
- Upcoming Trainings
- WRS Single Payroll Transition Program Reminders
- ACA Filing Errors
- Funding Page Lockout
- Fiscal Year End Landing Page
- Sabbatical Reminders
- Pay Plan Workshop
- ACA Workshop
- HRS Data Cleanup
- MyUW to HRS Portal Transition Project



PORTAL ARTICLES

Recently Posted

- [WRS Statement of Benefits Available](#)
Employees in the Wisconsin Retirement System can view their WRS Statement of Benefits as of January 1, 2024, on the MyUW portal.
- [Are You Saving Enough for Retirement?](#)
Are your retirement savings on track? Online calculators are available to help plan saving for retirement.

Upcoming Articles

- Review/Update Your Address and Personal Information
- Submit Leave Reports by June 30, 2024
- Employee Well-Being Webinars



UPCOMING EMPLOYEE EMAILS

EMAIL

- Review/Update Your Address and Personal Information
- Enroll Today in the UW 403(b) Supplemental Retirement Program

SCHEDULED DISTRIBUTION

4/24 & 4/25

Week of 4/22

Please Note: Distribution dates are subject to change.



UPCOMING TRAININGS

- Finance
 - Setting up Funding
Thursday, May 16, 9am-12pm (remote)
 - Changing Funding
Friday, May 17, 9am-12pm (remote)
 - Direct Retro
Friday, May 31, 8:30am-12pm (remote)

[My Learning Path](#)



WRS-SINGLE PAYROLL TRANSITION PROGRAM REMINDERS

- Fiscal Year 2024 is the last year of the program
- Employee must separate service between June 15, 2024 and February 15, 2025 to be eligible
- Perform compensable work between June 15 and June 30, 2024
- WRS-Single Payroll Transition Program Application for Fiscal Year 2024 are due **May 1, 2024**
 - Copy of an official WRS Retirement Benefit Estimate dated within 12 months of their separation date is also required to be submitted with application



WRS-SINGLE PAYROLL TRANSITION PROGRAM

Communications:

- February 5, 2024 – Targeted email sent to eligible employees
- April 8, 2024 – Reminder email sent to eligible employees
- Week of June 17, 2024 – Reminder to employees who applied and were approved what to expect on June and July paychecks

Employee Questions:

- [Institution HR Representative](#) - Coordinating retirement date and use of banked leave to extend time on payroll
- [Institution Benefits Contact](#) - Questions on the program

HR/Benefits Administrator Questions:

- Program/Policy clarification – uwshr@wisconsin.edu
- Processes, Status of applications – serviceoperations@support.wisconsin.edu



WRS-SINGLE PAYROLL TRANSITION PROGRAM

- Resources:
 - [WRS-Single Payroll Transition web page](#)
 - [FAQ](#)
 - [Application](#)



QUESTIONS?





AFFORDABLE CARE ACT FILING ERRORS

- Annually the IRS requires employers to submit information about employee eligibility for health insurance under the Affordable Care Act (ACA). This information includes an employee's full name and Social Security Number (SSN).
- The IRS confirmed receipt of this information for the Universities of Wisconsin. The IRS indicated there were 168 active employees included on the filing with a full name and/or SSN that differs from IRS records.



AFFORDABLE CARE ACT FILING ERRORS

- Summary of affected employees:

Institution	Number of Affected Employees
UW-Eau Claire	2
UW-La Crosse	1
UW-Milwaukee	3
UW-Madison	151
UW-Parkside	1
UW-Platteville	1
UW-Stevens Point	1
UW-Superior	1
UW System Administration	1
UW-Whitewater	6



AFFORDABLE CARE ACT FILING ERRORS

- Action Required:
 1. Each institution (HR administrator) with affected employees should work directly with the employee to obtain a new paper Form W-4 via U.S. Mail.
 2. Upon receipt of the new Form W-4, compare the employee's full name and SSN provided on the new Form W-4 to how it appears in HRS.
- The purpose of obtaining a new Form W-4 is to ensure the full name and SSN are accurate for required reporting going forward.
- If an employee does not return a new Form W-4, document the effort to obtain a new Form W-4. No further action is necessary. Do not contact the employee more than once.



AFFORDABLE CARE ACT FILING ERRORS

- If the information on the new Form W-4 **is the same** as it is in HRS, update the withholdings, if necessary, then file the form. No further action is necessary.
 - Reference [Entering an Employee's Tax Form W-4 Withholding Allowance Certificate in HRS \(KB 16889\)](#) for updating withholdings
- If the information on the new Form W-4 **is different** than HRS:
 - To correct an employee's name, send an email to serviceoperations@support.wisconsin.edu
 - To correct an employee's SSN, do so in HRS (reference [Modifying Person Data in HRS \(KB 17785\)](#)), then:
 1. Send an email to serviceoperations@support.wisconsin.edu to indicate that the SSN needs to be updated. Do not include the SSN in the email.
 2. Complete the [ETF Employee Identification Correction/Change Form \(ET-2810\)](#). Leave the agent signature blank.
 3. Fax the ETF form and a copy of the new Form W-4 to UW-Shared Services, Service Operations (reference the ticket number)



AFFORDABLE CARE ACT FILING ERRORS

- Next steps:
 - Universities of Wisconsin Office of Human Resources will send the report with the IRS errors to the affected institutions. A template letter will be included (to explain the reason to the employee for the request for a new Form W-4).
 - Institution HR administrators should
 - Send the letter and a blank Form W-4 to affected employees **via U.S. Mail by May 24.**
 - If necessary, work with UW-Shared Services, Service Operations to update the employee's information in HRS.
- Contact Universities of Wisconsin Office of Human Resources at uwshr@wisconsin.edu with questions



QUESTIONS?





FUNDING PAGE LOCKOUT

- Budget Funding Data Entry and Direct Retro page lockout begins at 4pm on Friday May 10, 2024 for:
 - FY2025 Funding load from Compensation Administration Tool (CAT)
 - Test Rollover of FY2024 funding to FY2025
 - This is the first of two lockouts in May that will occur for the FY2025 rollover
- Funding Data Entry and Direct Retro pages will be available by the end of the day Monday, May 13, 2024



FISCAL YEAR END LANDING PAGE

- [2024 Fiscal Year End \(HRS\) \(wisconsin.edu\)](#)
2024 Fiscal Year End (HRS)

[Timeline](#) [Calendar](#) [Resources](#)

[Printable Calendar](#)

May 2024

MAY 1	Recommended earliest date to begin Fiscal Year (FY) 2025 funding entry (Funding Entry Guide)
MAY 10 (4:00 PM) - 13	Budget Funding Data Entry and Direct Retro page lockout for: - FY2025 Funding Load from CAT - Test Rollover of FY2024 Funding to FY2025
MAY 13 - 17	Campuses will receive CAT to CA and Test Funding Rollover Error Results for review
MAY 18 (2:00 AM)	Short Work Break Job Data row inserts
MAY 24	Deadline to correct funding to avoid Funding Rollover errors (4pm)
MAY 24 (4:00 PM) - JUNE 2	Budget Funding Data Entry and Direct Retro page lockout for: - Funding Rollover from FY2024 to FY2025

June 2024

July 2024

August 2024



FISCAL YEAR END FUNDING ENTRY GUIDE

Pay Run ID	Pay Frequency	Pay Period Begin Date	Pay Period End Date	Funding Entry Deadline/ Final Calc Day	WISER Journal Date	Payment Date
2024BW07A	Biweekly	06/30/2024	07/13/2024	07/18/2024	07/18/2024	07/25/2024

[Summer 2024 Calendar](#)

Funding Data Entry guidelines:

1. If employee's funding source is not changing at the beginning of FY2025:

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 (see above)

2. If employee's funding source is changing at the beginning of FY2025:

Two funding Eff Sequences are needed before Final Calc Day

- First Eff Sequence 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 (see above)
- Second Eff Sequence with the new funding source must be manually entered with an Effective Date matching the Pay Period Begin Date (see above)



QUESTIONS?





FACULTY SABBATICAL HRS PROCESS- REMINDER

Faculty Sabbatical Program- UWS Administrative Policy 160

- Two types of sabbatical leaves are available to faculty members:
 - A faculty member may take a sabbatical leave for an academic year and receive from the institution financial support at any level up to sixty-five percent of his/her full compensation for that period, in accordance with institutional policies
 - A faculty member may take a sabbatical leave for one semester of the academic year and receive from the institution financial support at any level up to a maximum of his/her full compensation for that period



FULL ACADEMIC YEAR SABBATICAL

A faculty member:

- Receive financial support from the UW institution at any level up to 65% percent of his/her full compensation for that period
- Could secure a buy out from an outside source for up to a 35% reduction
- Maintains 100% full-time rate for WRS (earnings, creditable service, contributions) and Absence accruals while on a faculty sabbatical

Procedure:

- Record the faculty sabbatical on the Profile Management Page in HRS
- Change FTE on Position (FTE is changed to 65% of the full FTE amount, or in the case of a buy out, the FTE change could be up to 99%)
- Enter an Additional Pay (earnings code USB) for both hours and pay to make the employee whole for WRS and Absence accruals



ONE SEMESTER FACULTY SABBATICAL

A faculty member:

- Approved to take a sabbatical for one semester of the academic year and receive from the institution financial support at any level up to a maximum of his/her full compensation for that period

Procedure:

- Record the faculty sabbatical on the Profile Management Page in HRS
- Add a job row to record the one-semester sabbatical leave
- Faculty receiving full compensation
 - No FTE change needed
 - No additional pay USB earnings code needed



RESOURCES

- [UW System Administrative Policy 160: The Faculty Sabbatical Program](#)
- HRS Process Supporting KBs
 - [KB-17072 Entering a Faculty Sabbatical in HRS](#)
 - [KB-16269 Entering Person Profile Management in HRS](#)
 - [KB-16273 Managing Position Data in HRS](#)
 - [KB-17094 Entering Additional Pay in HRS](#)



ENTERING RETURN FROM SABBATICAL

- Employees returning from sabbatical at the end of spring semester and will work in the summer may need a return row added if not previously entered
- Example – Academic Year Faculty Contract Period Ends 5/21/2024
 - Enter a return row with the effective date of 5/22/2024 in Job Data with the Action/Reason Return from Leave/Return from Leave
 - Next a Short Work Break Row should be entered for the same date using the next sequence number
- Submit a ticket if you need assistance with the action
- Reminder: Review USB additional pay entry when employee is returned at non-Payroll Service Delivery institutions



QUESTIONS?





PAY PLAN WORKSHOP

- Save the date: Thursday May 16, 2024, from 1-2pm
- Topics will include:
 - Timeline
 - Template review and instructions
 - Q and A
- Invite extended to the Institution Administrator call list



ACA WORKSHOP

- UW-Shared Services will be providing an ACA Workshop in June 2024
- Workshop will include:
 - Breakdown of most recent filing errors/penalties
 - Explanation of measurement period and how that affects ACA determinations
 - Employee types to watch for
 - How to review the reports
 - Importance of reporting ACA hours
- Invite extended to the Institution Administrator call list



HRS DATA CLEANUP

New Cleanup Tasks:

- Position Management: Initiative underway to maintain *position numbers* at each institution in HRS by the end of the fiscal year
 - Will be looking to inactivate vacant positions
- POIs in Business Units R (UW-Colleges) and T (UW-Extension)
 - Emails will be sent to the 4-year institutions where the 2-year colleges are now associated

Weekly Audits:

- Will be sent out Monday, April 29 to data clean up contacts
 - Employees with A, C, or H pay basis missing compensation rates
 - LTEs (CL) employees missing EJEDs
 - Employees with backup positions, but no LI job
 - ET3 with continuity 03



QUESTIONS?



























MYUW TO HRS PORTAL TRANSITION PROJECT

- Go-live June 11, 2024
- URL will remain: [my.Wisconsin.edu](https://my.wisconsin.edu)
 - [Hrs.Wisconsin.edu](https://hrs.wisconsin.edu) will also work
- Non HRS content from MyUW portal will be managed through a campus specific page (ie: Okta page may include a link to ShopUW+)
- Communication plan being developed



MY.WISCONSIN.EDU – MYUW PORTAL

Search for apps by keyword... 

HRS Approvals  5 approvals need your attention.	HR, Payroll and Benefits News  Reminder: March 31 Deadline for Su Maintain Insurance Coverage with A ETF In-Person Group Retirement Ap Showing 3 of 17	Time and Absence  	Payroll Information   Earnings Statements  Update Direct Deposit  Tax Statements  Update W4
See all	See all	Launch full app	Launch app
Benefit Information  Learn more	Manager Time and Approval   Time/Absence Dashboard  Approve Absence	Benefits and Payroll Resources  	Personal Information  
Launch full app	See all approval options	Launch full app	Launch full app
Performance Management 	Mandatory Training 	Canvas Courses 	UW System Career Opportunities 



HRS – EMPLOYEE SELF SERVICE

Security Provisioning eForms



Careers



Recruiting Home



Time and Absence



Payroll



Last Pay Date **03/21/2024**

My Information



Benefits and Well-Being



Mandatory Training



Benefits Enrollment



Performance



2 Current Documents

HR, Payroll, and Benefit News



Campus Dashboard

You are not authorized for this page.

Welcome to HRS



No Announcements available



HRS – MANAGER SELF SERVICE

Service Notice: This app may be offline on Sundays, 6-10 a.m. for routine maintenance

Approvals



6

Manager Time and Absence



Team Performance



15 In Progress Documents

Welcome to HRS



No Announcements available

Recruiting Home





QUESTIONS?





TICKET REMINDER

When sending an email to service operations, serviceoperations@support.wisconsin.edu, remember to include the following critical information:

- Full legal name (First & Last Name)
- Employee Empl ID
- Employee Record

If seeing unexpected results or error messages, include a screenshot



CAMPUS COLLABORATION & DISCUSSION

For discussion topics, please email
uwss-svc.CampusCallSlides@uwss.wisconsin.edu



THANK YOU