HRS Coordinators

March 27, 2014
1 – 2:30 p.m.
Room 1106/1108, 21 N. Park
What We’ll Cover

1. Key OHR organizational structure recommendations
2. Proposed functional organization
3. Proposed HR competencies
4. Questions and answers.
OHR Organizational Review

Huron Assessment

Aug – Oct
- 197 Participants
- 50 Participants
- 40 Participants
- 59 Participants

346 Total Participants

Huron Deliverables

Nov
- Report on Current-State Capabilities
- Potential Organizational Models
- Proposed Roles and Responsibilities Matrix
- Proposed HR Competencies

UW Refinement

Dec – Jan
- Refined Huron Recommendations and Developed Proposed New Model
- Developed UW-Specific HR Competencies
- Proposed Implementation Plan and FTE Analysis
# Recommendations

<table>
<thead>
<tr>
<th>Recommendation</th>
<th>Description</th>
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<tbody>
<tr>
<td>Consolidate <strong>customer-facing</strong> functions</td>
<td>Deliver services seamlessly, by function, regardless of employee classification (e.g., one employee relations office for all employees)</td>
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</tbody>
</table>
| Add **talent management**, **compensation**, and **distributed support** capability | - Be capable of performing functions required by HR Design Strategic Plan.  
- Add organizational capability in talent management, compensation, and HR community of practice |
| Improve **communication**, **execution**, and **operating capability** | Improve OHR’s communication, execution and operations capabilities by creating permanent communication and project management functions, plus internal operations unit |
| Develop **centers of HR expertise** in OHR | Limit need by campus units to develop and implement programs by developing OHR centers of expertise to lead program development and enable OHR to play lead role in supporting campus-wide HR community of practice |
| Enhance **data and analytic** capability | Develop workforce metrics and reporting capabilities |
Proposed Functional Organization

- Chancellor
  - Vice Chancellor
  - Asst. Vice Chancellor

HR Operations
- Compensation and Titling
  - Job Titles
  - Compensation planning and analysis
  - Employee movement transactions
- Employee Services
  - International Faculty and Staff Services
  - Benefits administration
  - Payroll services
  - New hire processing
  - HRS support and coordination
- HR Community of Practice
  - HR training
  - HR business process improvement
  - HR knowledge and expertise transfer
- Talent Management
  - Employee learning and development
  - Competency development
  - Talent acquisition
  - Engagement, inclusion, and diversity
  - Cultural linguistic services
  - Performance management
  - Employee wellness
- Workforce Relations
  - Employee and labor relations
  - FMLA/special leave administration
- Employee Assistance
  - Employee assistance program
- Internal Operations
  - Administrative support
  - Shared Administrative Services
  - Project management
  - HR communications
  - HR policy support
  - Workforce metrics and reporting

HR Operations Center of Expertise
Community of Practice
TM Center of Expertise
Workforce Relations Center of Expertise
OHR Operations Center
# Draft HR Competencies

## Sample Behavior

| Collation | • Ability to communicate HR concepts and ideas to internal and external audiences  
• Ability to foster inclusion and respect across a diverse workforce  
• Ability to develop positive relationships with colleagues and clients, and lead and encourage collaboration  
• Ability to develop, maintain, and leverage relationships  
• Ability to effective work with, and lead, teams  
• Understands role of shared governance and how to effectively partner/interact with these groups |
| --- | --- |
| HR Knowledge and Expertise | • Develops and maintains expertise in assigned HR functional area  
• Understands HR functional areas outside of area of focus  
• Understands how assigned functional area fits into larger HR strategy  
• Ability to develop, interpret and follow HR laws and policies  
• Ability to communicate HR concepts and ideas  
• Understands, values and promotes diversity |
| Problem Solving | • Ability to identify/anticipate problems and obstacles, and develop appropriate mitigation strategies  
• Ability to solve problems while considering potential cross-functional HR and organizational impacts  
• Ability to apply learning from previous experiences to develop solutions to new problems |
| Managing Change | • Ability to operate in a fast-paced environment with shifting priorities  
• Ability to be flexible  
• Ability to assess strategic needs and develop solutions  
• Ability to anticipate and assess impacts of change  
• Ability to plan and manage the change process  
• Understands and can apply business process review methodology  
• Ability to champion change and articulate benefits of change |
| Execution | • Ability to escalate issues to appropriate parties  
• Ability to prioritize tasks appropriately  
• Ability to complete projects within scope, on time and within budget  
• Ability to deliver high-quality HR products and services  
• Ability to identify overlap or cross-functional impacts in multiple projects or tasks |
Next Steps

- Brief Chancellor, Provost and VCFA
- Share with constituents across campus
  - HR reps
  - HRS coordinators
  - Governance groups (e.g., Shared Governance Advisory Committee)
  - VCFA directors
  - Administrative Council
  - Etc.

- Collect feedback
Survey website will be provided.
Agenda

• Recoupment of Salary Overpayments
• Benefits Summary
• Basic Benefits Training
• ACA
  – Change in Notification
  – Lump Sum Payments
• Security
  – Security Awareness
  – Separation of Duties
• Fiscal Year End
• WED
• Service Center Priorities
• Miscellaneous
Recent interpretations of Wisconsin law by Office of Legal Affairs has determined that each case of the overpayment of salaries must be reviewed on a case-by-case basis.

Depending on the circumstances, recoupment of wages may or may not be legally defensible.

When salary overpayments are identified, the first contact should be:

- Classified Staff: Your Classified Human Resources Specialist
- Academic Staff: Catharine DeRubeis: cderubeis@ohr.wisc.edu

These offices will review the circumstances and consult with appropriate offices (Benefit Services, Payroll Services, Legal Affairs, etc.) on the appropriate course of action.
Benefits Summary

• WRS eligible employees with start dates between December 2, 2013-December 1, 2014
• Summary Features Include
  – Welcome letter
  – New Employee Benefit Resources
  – Plan overviews
  – Premium Information for 2014
  – SGH comparison chart of HMO’s and Standard Plan
  – Dental comparison chart of Uniform Dental, Epic Benefits+, and Dental WI PPO/Select
  – Life Insurance comparison chart
• Any feedback, questions, comments can be directed to Deanna at dglatczak@ohr.wisc.edu
Basic Benefits Training

For UW-Madison HR Assistants and/or Payroll Coordinators who work with benefits at the department or division level.

Friday, May 16, 8:30 to noon  
Wednesday, May 21, 8:30 – noon  
Thursday, May 29, 8:30 – noon  
Thursday, June 12, 8:30 – noon  
Wednesday, June 18, 8:30 – noon  
Thursday, June 26, 8:30 – noon

HSLC, room 1220  
Union South  
Union South  
Union South  
Union South  
21 North Park, 1st floor

Registration:  https://www.ohrd.wisc.edu/home/
Affordable Care Act

Change in UWACA notification (email 2/18/14)

- First notification sent on 5th day of employment
- Allows for work email to be entered by department
- If name@wisc.edu is replaced with name@something.wisc.edu, the new email will be used.
- Otherwise, all email addresses in HRS will be used
- User Guide included with 2/18/14 email from Michele Rohde
- Don’t forget to record when paper notice is sent

L pay basis payment

- UW System group to review lump sum payments
- May result in attempts to drastically reduce the number of lumps to avoid issues with ACA, i.e., determining a 30 hour work week for benefits eligibility
Security Awareness Test

• New report sent this morning
• Deadline March 28, 2014
• Access removed this weekend if failed test

Separation of Duties (SOD)

• LAB Audit Issue
• Potential HRS security role conflicts
  – Updating Person/Position/Job **AND** Time Coordinator/Approver
  – Updating Person/Position/Job **AND** Direct Deposit Update
  – Updating/Person/Position/Job **AND** Custody or Distribution of Paper Checks
  – Absence and/or Time Coordinator/Approver **AND** Custody or Distribution of Paper Checks
• Reports reflecting these conflicts being produced
• Analysis, responses, role changes or compensating controls between now and June 20
Fiscal Year End (FYE) – What’s New?

• Not Much!
  – SFS Upgrade
    • New Error Messages
    • Funding is now budget checked – Produces “Budget Does Not Exist” error
    • Funding Edit checks are more stringent
  – We anticipate some edit checking on funding rollover
  – Finance Team will be coordinating with the insertion of Job Data rows from Pay Plan to ensure proper sequencing
Fiscal Year End

• How FYE 2015 Funding Is Populated:
  – Manual Entry
    • Provides most control
    • Recommended for complex entries, e.g., more than about 5 funding lines
  – Budget Import
    • Full funding, including projects must be known well in advance
  – Funding Rollover
    • Convenient, but allows greater potential for future funding issues
Fiscal Year End – Staying Informed

• FYE Communication Methods:
  – Weekly AG Call Ins
  – Hot Topics Wislines
  – HRS Coordinators Meetings
  – FMM Meetings
  – Finance/FYE Website
    https://uwservice.wisc.edu/administration/finance.php
  – Messages from Service Center Communications Team
  – Service Center training team will provide assistance with documentation, handouts and presentations
### Fiscal Year End

- Monthly Payroll that Crosses Fiscal Years:

#### UW-Madison Summer 2014 Calendars

<table>
<thead>
<tr>
<th>Pay Run ID</th>
<th>Pay Group</th>
<th>Period Begin Date</th>
<th>Period End Date</th>
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<tbody>
<tr>
<td>2014UNC06</td>
<td>ARG A-basis</td>
<td>06/01/2014</td>
<td>06/30/2014</td>
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<tr>
<td></td>
<td>MSN Summer Session</td>
<td>05/26/2014</td>
<td>06/22/2014</td>
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<tr>
<td></td>
<td>MSN Summer Service</td>
<td>05/26/2014</td>
<td>06/25/2014</td>
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<tr>
<td>2014UNC07</td>
<td>ARG A-basis</td>
<td>07/01/2014</td>
<td>07/31/2014</td>
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<tr>
<td>Crosses Fiscal Year</td>
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<td>07/20/2014</td>
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</table>
### Biweekly Payroll that Crosses Fiscal Years:

<table>
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<th>Pay Period</th>
<th>Pay Run ID</th>
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<tbody>
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<td>Jun B</td>
<td>2014BW06B</td>
<td>06/15/2014 - 06/28/2014</td>
<td>07/10/2014</td>
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**Biweekly Pay Schedule**

Classified and Student Hourly

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*Crosses Fiscal Year*
Fiscal Year End

• Issues affecting Payrolls that Cross Fiscal Years:
  – Funding that changes at fiscal year
  – New hires/rehires/transfers/department changes with a start date before 7/1 entered after budget import and funding rollover process has been completed

• Implications – a single funding issue may stop all payroll processing for all employees at all campuses
Fiscal Year End – Best Practices

• Optimal Funding Entry date is no more than 30-60 days in advance of effective date due to potential subsequent Job Data entries

• Ensure that all employees current funding has been updated

• Be aware that other HRS Activities (Pay Plan, Summer Prepays, Job Data Changes) all affect FYE

• Remember that C-Basis employees need continuous funding over summer for prepay employer share fringes
• Queries on the initial release
  – Missing date of birth
  – Missing home addresses
  – Limit pay basis by job code
  – Incorrect rehired annuitant flag
  – Defaulted SSN
  – Missing Continuous Service data
  – New Hire Hold
• Rollout – Who has signed up so far? Who is interested in being an early adopter?
• Security role is required
Service Center Top Priorities

As outlined by Steve Wildeck, UW System VP for Finance, to the HR Directors on 3/24/14

- Security – Separation of Duties
- Reconciliation
  - State Group Health Overpayment
  - Improve Process
- Benefits Administration Redesign
- Upgrade Planning
**Miscellaneous**

**New Self-Identification Forms – OFCCP Changes**
- Collection of disability and veteran information

**New Org Departments**
- Additional UDDS’ for new HRS organizational departments may take up to two weeks

**Direct Deposit (ACH) Campaign**
- Effort to reduce number of paper checks

**HRS Entry during evening hours**
- A few benefits errors are occurring if entries are made when batch processes are running for the same payroll cycle; they appear on the reconciliation reports

**Craftsmen and WRS**
- Contact Madison Benefits Services to verify prior WRS

**Payroll and Benefits Survey**
- Deadline 4/4/14

**Any questions on prepaids?**
- Jennifer available after meeting to answer your questions
Future HRS Coordinator Meetings

• Thursday April 24
• Thursday May 22
• Thursday July 24
• Wednesday August 27
• Thursday September 25
• Thursday October 23
• Thursday December 11

All are 1 – 2:30 p.m. in 1106/1108, 21 North Park