HRS Coordinators’ Meeting

April 24, 2014
1 – 2:30 p.m.
Room 1106/1108, 21 N. Park
Agenda

- New OFCCP Requirements
- Fellows
- Benefits
  - Benefits Summary
  - WRS Statements
  - Rehired Annuitant Forms
- Training
  - Mini-Courses
  - Glacier
- WED
- Separation of Duties
- PeopleTools Upgrade
- Fiscal Year End
- Schedule of Future Meetings
Pre-Offer Forms

**Classified Applicant Notification**

- Hardcoded statement within the announcements on the Employment Website & The State of Wisconsin’s Employee Referral Service (WISCERS) website
  - UW-Madison is required by law to request data from applicants for employment in order to monitor our recruitment and selection practices. In order for us to meet this federal reporting requirement, please go to http://www.oed.wisc.edu/reports-and-forms.htm to fill out the Voluntary Self-Identification of Disability and Protected Veterans forms. **Please reference the Vacancy ID at the top of the announcement when uploading your completed forms.** Completing these forms is voluntary and your responses will be kept confidential and is not considered as part of the hiring criteria.
Employee Pre-Offer     OFCCP Changes

• Statement language developed to be included in WiscJobs announcements
  – UW-Madison is required by law to request data from applicants for employment in order to monitor our recruitment and selection practices. In order for us to meet this federal reporting requirement, please go to http://www.oed.wisc.edu/reports-and-forms.htm to fill out the Voluntary Self-Identification of Disability and Protected Veterans forms. Please reference Vacancy ID #[Insert Vacancy ID #] when uploading your completed forms. Completing these forms is voluntary and your responses will be kept confidential and is not considered as part of the hiring criteria.

• Developed examples of statement language for the applicant packet cover page when using off-line exams with paper applicant packets
  – UW-Madison is required by law to request data from applicants for employment in order to monitor our recruitment and selection practices. In order for us to meet this federal reporting requirement, please fill out the attached Voluntary Self-Identification of Disability and Protected Veterans forms and mail to: The Office of Equity and Diversity, Equal Opportunity Program Specialist, 179A Bascom Hall, 500 Lincoln Drive, Madison, WI 53590, or go to http://www.oed.wisc.edu/reports-and-forms.htm to fill out the forms. Please reference Vacancy ID #[Insert Vacancy ID #] when uploading your completed forms. Completing these forms is voluntary and your responses will be kept confidential and is not considered as part of the hiring criteria.
Unclassified Applicant Notification

As a recipient of federal contracts, the University of Wisconsin-Madison is required by law to request data from applicants for employment. Submission of the information requested on this web-based questionnaire is entirely voluntary. The information you provide will be used to meet the university's data collection and reporting responsibilities, and to assess the effectiveness of our AA/EEO recruitment and selection efforts. The information will be kept confidential and will not be considered as part of the hiring criteria.

Please complete the Affirmative Action/Equal Employment Opportunity (“AA/EEO”) Data Questionnaire, the Voluntary Self-ID of Disability Form, and the Applicant Self ID Form for Protected Veterans, found at http://oed.wisc.edu/reports-and-forms.htm.
**Unclassified Applicant Notification**

- APO is working with DoIT to include a hardcoded statement within the announcement on the Employment Website as follows: "UW-Madison is required by law to request data from applicants for employment in order to monitor our recruitment and selection practices. In order for us to meet this federal reporting requirement, please go to [http://www.oed.wisc.edu/reports-and-forms.htm](http://www.oed.wisc.edu/reports-and-forms.htm) to fill out the Voluntary Self-Identification of Disability and Protected Veterans forms. **Please reference the Position Vacancy Listing Number [insert PVL #] when uploading your completed forms.** Completing these forms is voluntary and your responses will be kept confidential and is not considered as part of the hiring criteria."
Compliance Forms

Applicant Information. As a recipient of federal contracts, UW–Madison is required by law to request data from applicants for employment in order to monitor our recruitment and selection practices. Submission of the information requested on this web-based questionnaire is entirely voluntary. The information you provide will be used to meet the university’s data collection and reporting responsibilities, and to assess the effectiveness of our AA/EOO recruitment and selection efforts. The information will be kept confidential and will not be considered as part of the hiring criteria. Moreover, you will not be excluded from consideration if you decline to provide this information. Read the full memo about UW–Madison’s responsibilities.

Affirmative Action/Equal Employment Opportunity Data Questionnaire

Voluntary Self-Identification of Disability Form

Applicant Self-Identification Form for Protected Veterans

The Affirmative Action Review Form (AARF) is provided in both Word or PDF formats. Please print and sign before submitting.
Dear Applicant:

I would like to request your assistance with our efforts to provide equal access and equal employment opportunity. Please complete the Affirmative Action/Equal Employment Opportunity ("AA/EO") Data Questionnaire, the Voluntary Self-Identification of Disability Form, and the Applicant Self-Identification Form for Protected Veterans, found at http://www.oed.wisc.edu under Reports & Forms.

As a recipient of federal contracts, the University of Wisconsin-Madison is required by law to request data from applicants for employment in order to monitor our recruitment and selection practices. Submission of the information requested on these web-based questionnaires is entirely voluntary. The information you provide will be used to meet the university's data collection and reporting responsibilities and to assess the effectiveness of our AA/EO recruitment and selection efforts. The information will be kept confidential and will not be considered as part of the hiring criteria. Moreover, you will not be excluded from consideration if you decline to provide this information.

Federal and state laws require the University to request specific data elements:

- Affirmative Action/Equal Employment Opportunity Data Questionnaire (Executive Order 11246)
- Voluntary Self-Identification of Disability (Section 503 of the Rehabilitation Act of 1973)

Thank you for your cooperation. If you have any questions or concerns about how your data will be used, you are welcome to contact Bonnie Sundal at: (608) 262-2012 or (608) 263-2578, by email brosnal@oed.wisc.edu. At the bottom of the online form is a submit button. Once you submit online the data will be stored into OED's private database.

Thank you,

Bonnie Sundal
EEO Program Specialist
Office for Equity and Diversity
Voluntary Self-Identification of Disability

Why are you being asked to complete this form?

Because we do business with the government, we must reach out to, hire, and provide equal opportunity to qualified people with disabilities. To help us measure how well we are doing, we are asking you to tell us if you have a disability or if you ever had a disability. Completing this form is voluntary, but we hope that you will choose to fill it out. If you are applying for a job, any answer you give will be kept private and will not be used against you in any way.

If you already work for us, your answer will not be used against you in any way. Because a person may become disabled at any time, we are required to ask all of our employees to update their information every five years. You may voluntarily self-identify as having a disability on this form without fear of any punishment because you did not identify as having a disability earlier.

How do I know if I have a disability?

You are considered to have a disability if you have a physical or mental impairment or medical condition that substantially limits a major life activity, or if you have a history or record of such an impairment or medical condition.

Disabilities include, but are not limited to:

- Blindness
- Deafness
- Cancer
- Diabetes
- Epilepsy
- Autism
- Cerebral palsy
- HIV/AIDS
- Schizophrenia
- Muscular dystrophy
- Bipolar disorder
- Major depression
- Multiple sclerosis (MS)
- Intellectual disability (previously called mental retardation)
- Post-traumatic stress disorder (PTSD)
- Obsessive compulsive disorder
- Impairments requiring the use of a wheelchair
- Missing limbs or partially missing limbs

Please check one of the boxes below:

☐ YES, I HAVE A DISABILITY (or previously had a disability)
☐ NO, I DON'T HAVE A DISABILITY
☐ I DON'T WISH TO ANSWER

Your Name

Today's Date

Reasonable Accommodation Notice

Federal law requires employers to provide reasonable accommodation to qualified individuals with disabilities. Please tell us if you require a reasonable accommodation to apply for a job or to perform your job. Examples of reasonable accommodation include making a change to the application process or work procedures, providing documents in an alternate format, using a sign language interpreter, or using specialized equipment.

1 Section 503 of the Rehabilitation Act of 1973, as amended. For more information about this form or the equal employment obligations of Federal contractors, visit the U.S. Department of Labor’s Office of Federal Contract Compliance Programs (OFCCP) website at www.dol.gov/ofccp.

PUBLIC BURDEN STATEMENT: According to the Paperwork Reduction Act of 1995 no persons are required to respond to a collection of information unless such collection displays a valid OMB control number. This survey should take about 5 minutes to complete.
APPLICANT SELF-IDENTIFICATION FORM FOR PROTECTED VETERANS

The University of Wisconsin-Madison is a Government contractor subject to the Vietnam Era Veterans' Readjustment Assistance Act of 1974, as amended by the Jobs for Veterans Act of 2002. 38 U.S.C. §4212 (VEVRAA), which requires Government contractors to take affirmative action to employ and advance in employment disabled veterans, recently separated veterans, active duty wartime or campaign badge veterans, and Armed Forces service medal veterans. The classifications are defined below.

- A “disabled veteran” is one of the following:
  - a veteran of the U.S. military, ground, naval or air service who is entitled to compensation (or who but for the receipt of military retired pay would be entitled to compensation) under laws administered by the Secretary of Veterans Affairs;
  - a person who was discharged or released from active duty because of a service-connected disability.
- A “recently separated veteran” means any veteran during the three-year period beginning on the date of such veteran’s discharge or release from active duty in the U.S. military, ground, naval or air service.
- An “active duty wartime or campaign badge veteran” means a veteran who served on active duty in the U.S. military, ground, naval or air service during a war, or in a campaign or expedition for which a campaign badge has been authorized under the laws administered by the Department of Defense.
- An “Armed Forces service medal veteran” means a veteran who, while serving on active duty in the U.S. military, ground, naval or air service, participated in a United States military operation for which an Armed Forces service medal was issued pursuant to Executive Order 12985.

Submission of this information is voluntary and refusal to provide it will not subject you to any adverse treatment. The information provided will be used only in ways that are consistent with the Vietnam Era Veterans’ Readjustment Assistance Act of 1974, as amended.

If you believe you belong to any of the categories of protected veteran listed above, please indicate by checking the appropriate box below. As a Government contractor subject to VEVRAA, we request this information in order to measure the effectiveness of the outreach and positive recruitment efforts we undertake pursuant to VEVRAA.

☐ I IDENTIFY AS ONE OR MORE OF THE CLASSIFICATIONS OF PROTECTED VETERAN LISTED ABOVE.

☐ I AM NOT A PROTECTED VETERAN

☐ I DO NOT WISH TO DISCLOSE MY STATUS

Protected veterans may have additional rights under USERRA—the Uniformed Services Employment and Reemployment Rights Act. For more information, call the U.S. Department of Labor’s Veterans Employment and Training Service (VETS), toll-free, at 1-800-4-USA-DOL.

Date

Name

Signature
New Employee Packet

• Revised effective 3/24/14
  – First Page: UW Employee Self-Identification Form with Ethnic and Heritage Code
  – Second Page: Voluntary Self-Identification of Disability (same as pre-offer form; doesn’t have to complete again)
  – Third Page: Veteran Self-Identification
  – Fourth Page: W-4 Form (instructions on back)
Fellows

- Transition payments from Accounts Payable to HRS Payroll
- Positions/Jobs will need to be entered into HRS
- Individuals will need to enter info into Glacier
- Individuals will be taxed appropriately (not currently the case)
- List of individuals impacted is being produced
- Effective tentatively October 2014
- More info will be provided
Benefits

- Purpose of Benefits Summary
  - Employees requiring hard copy info
  - Prospective employees

- WRS Statements Distribution
  - Online
  - Hardcopy sent to home address if no email address
  - Any questions from active employees should be referred to Benefits Services (benefits@ohr.wisc.edu)
  - Benefits Services may need to refer them to ETF

- Rehired Annuitant Forms
  - Send direct to Service Center
  - Do not sign as Agent
  - Include benefits applications if returning to WRS
  - SC reviews for correct HRS entry
Training

• HRS and JEMS
  – Mini-Courses
    • Survey
  – JEMS Summer Hire eLearning
Training - Glacier

• Interest in training by division?
  (June, July, early August)

• Overview of Glacier process
  – Who needs to use Glacier
  – How to check if an employee has completed Glacier
  – Walk through of what the Employee sees in Glacier

• New email soon: glacier@ohr.wisc.edu

• Developing eLearning for new foreign nationals
Queries/Reports and Security Roles

Once given the WED security, queries/reports that are associated with specific security roles you already have will be displayed on your WED Dashboard. You may see some queries that you will not need to take action on, e.g., the New Hire Hold, however, others you should take action (see chart).

**UW_HR_NEW_HIRE_HOLD**
- UW_UNV_HR_ADMINISTRATOR
- UW_UNV_HR_JOB_DATA_UPDATE
- UW_UNV_BN_JOB_DATA_BENEFIT_UPD

**UW_HR_JOB_CODE_WITH_INCORRECT_PAY_BASIS**
- UW_UNV_HR_ADMINISTRATOR
- UW_UNV_HR_JOB_DATA_UPDATE

**UW_HR_MISSING_ADDRESSES**
- UW_UNV_HR_ADMINISTRATOR
- UW_UNV_HR_PERSON_UPD

**UW_HR_MISSING_ADJ_CONTINUOUS_SVC_DT**
- UW_UNV_HR_ADMINISTRATOR
- UW_UNV_HR_PERSON_UPD

**UW_HR_MISSING_OR_INCORRECT_DATE_OF_BIRTH**
- UW_UNV_HR_ADMINISTRATOR
- UW_UNV_HR_PERSON_UPD

**UW_HR_MISSING_SSN**
- UW_UNV_HR_ADMINISTRATOR
- UW_UNV_HR_PERSON_UPD

**UW_HR_REH_RET_EMP_INCORRECT_REH_ANNUITANT_FLG**
- UW_UNV_HR_ADMINISTRATOR
- UW_UNV_HR_JOB_DATA_UPDATE
Who is responsible for updating HRS?

<table>
<thead>
<tr>
<th>Query</th>
<th>Employee</th>
<th>Department</th>
<th>Division</th>
<th>Madison Central</th>
</tr>
</thead>
<tbody>
<tr>
<td>Missing date of birth</td>
<td>Yes, if HRS security</td>
<td>Yes, if not done by department</td>
<td>Yes, if request received from employee</td>
<td></td>
</tr>
<tr>
<td>Missing home addresses</td>
<td>Yes, via MyUW portal</td>
<td>Yes, if HRS security</td>
<td>Yes, if not done by department</td>
<td>Yes, if request received from employee</td>
</tr>
<tr>
<td>Limit pay basis by job code</td>
<td>No, controlled in JEMS</td>
<td>No, controlled in JEMS</td>
<td>No, controlled in JEMS</td>
<td></td>
</tr>
<tr>
<td>Incorrect rehired annuitant flag</td>
<td>Select in JEMS</td>
<td>Yes, can add or change</td>
<td>Yes, by Benefits Services if not done by division</td>
<td></td>
</tr>
<tr>
<td>Defaulted SSN</td>
<td>Yes, if HRS security*</td>
<td>Yes, if not done by department</td>
<td>Yes, if request received from employee</td>
<td></td>
</tr>
<tr>
<td>Missing Continuous Service date</td>
<td>No</td>
<td>No</td>
<td>Yes, verification at time of hire or updates</td>
<td></td>
</tr>
<tr>
<td>New Hire Hold</td>
<td>No</td>
<td>No</td>
<td>Yes, should only be done by Madison Benefits Services</td>
<td></td>
</tr>
</tbody>
</table>

Red: Strongly recommended

* 1) If all X’s are defaulted for SSN, enter Reporting ID as “0” + empl ID, then check ‘primary.’
   2) Pursue collection of SSN from employee for entry into HRS – required for W2 and 1042s.
   3) Internationals need to enter SSN in Glacier; HRS will then be updated.
   3) If manually entering the SSN into HRS, be sure the change the ‘primary’ to the SSN.
Workflow Exception Dashboard (WED)

• Submit requests for role (UW_UNV_WED) to Carla
  – OHR will enter security role in OIM in preparation for training
  – Only those with related security roles will be able to see the queries/report on the WED
  – Submit requests by May 9
• Service Center will schedule and provide training
Separation of Duties - Update

Separation of Duties (SOD)

- LAB Audit Issue
- Over 500 HRS end users with conflicts (new report)
- 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
  - Requests for Add’l Pay (lump sums) **AND** Entry into HRS
    - Requires form requesting payment
  - Job data updates, i.e., Student Help, SH Template, HR Administrator **AND** Time Coordinator/Approver
- Analysis, responses, role changes or compensating controls need immediate attention
- Will be scheduling a meeting with divisions to go over the report in the next couple of weeks
PeopleTools Upgrade

- One-day outage Saturday, April 26
- No access to HRS, e.g., entering time
  - Athletics – time clock punches will be stored in TimeLink for later processing into HRS
  - All others – time worked will need to be entered later in HRS either by the employee or a payroll coordinator from a paper timesheet
Fiscal Year End – Getting Started

FYE testing began in March

• Testing March – July payrolls
• Testing also includes
  • Budget Import & Funding Rollover
  • Encumbrance Reversal
  • Encumbrance Initialization
  • Direct Retros (salary cost transfers)

Contact Sue Adams if

• Interested in participating with testing
• Have questions or specific scenarios that need testing
• sjadams2@uwsa.edu

Check the FYE mail list to ensure correct people are receiving updates

• https://uwservice.wisc.edu/directories/index.php?institution=&division=&dept=&groups=&lists=39&mode=position

• Send requests for mailing list updates to uwsccommunications@sc.wisc.edu
Fiscal Year End Communications

FYE Communication Methods

• Finance/FYE Website  https://uwservice.wisc.edu/administration/finance.php

• Email from Service Center Communications Team
  • Depending on subject content, communications will be sent to:
    • FYE Mail List
    • Campus HRS Site Leads
    • Controllers
    • Communications Leads
    • Campus/Divisional Payroll & Benefits Coordinators
    • Campus CBOs
    • Budget Officers
    • UW Madison FMM group

• Hot Topics Wislines
  • Topics announced in advance so appropriate representatives can participate
  • Currently Scheduled for April 29 and June 10

• Weekly Affinity Group Calls – campus specific for HR and payroll/benefit coordinators (as needed)

• Campus specific meetings
  • HRS Coordinators
  • FMM Meetings
## Fiscal Year End Key Dates

<table>
<thead>
<tr>
<th>Date</th>
<th>Task Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>March 15</td>
<td>FYE Testing Began</td>
</tr>
<tr>
<td>April 1</td>
<td>Dual year edits available</td>
</tr>
<tr>
<td>May 17 or May 24(tbd)</td>
<td>Short Work Break Job Data Row Insert</td>
</tr>
<tr>
<td>May 31 – June 1</td>
<td>Unclassified Pay Plan Job Data Row Insert</td>
</tr>
<tr>
<td>June 6-8</td>
<td>Budget Import</td>
</tr>
<tr>
<td>June 9-13</td>
<td>Funding Rollover</td>
</tr>
<tr>
<td>June 9-13</td>
<td>Encumbrance Full Reversal</td>
</tr>
<tr>
<td>June 18</td>
<td>Salary Cost Transfers (SCTs) processed through Cost Transfer Tool for FY 2014 must be fully approved by June 18 to guarantee entry into FY 2014. After this cutoff date, SCTs will be processed as time permits</td>
</tr>
<tr>
<td>June 20</td>
<td>Final 2014UNC06 Monthly Calc and Confirm</td>
</tr>
<tr>
<td>June 20</td>
<td>Classified Pay Plan Job Data Row Insert</td>
</tr>
<tr>
<td>July 3</td>
<td>Final 2014BW06B Biweekly Calc and Confirm</td>
</tr>
<tr>
<td>July 7-11</td>
<td>Encumbrance Initialization Process</td>
</tr>
<tr>
<td>July 14</td>
<td>First day Salary Cost Transfers entered in the Cost Transfer Tool will be posted in FY 2015</td>
</tr>
<tr>
<td>July 17</td>
<td>Final 2014BW07A Biweekly Calc and Confirm</td>
</tr>
<tr>
<td>July 24</td>
<td>Final 2014UNC07 Monthly Calc and Confirm</td>
</tr>
<tr>
<td>August 26</td>
<td>Return from Short Work Break, C-Basis Pay Plan Job Data Row Insert</td>
</tr>
</tbody>
</table>

All dates tentative and subject to change
Fiscal Year End – What’s New?

Not Much!

- SFS Upgrade Implications
  - New Error Messages
  - Funding is now budget checked for some project funding – Produces “Budget Does Not Exist” error
  - Funding Edit checks are more stringent
  - We are hopefully nearing resolution for complex funding entries on funding entry page

- We anticipate some edit checking on funding rollover – Department ID, project expiration

- To ensure proper sequencing, Finance Team will coordinate Job Data row insertion for:
  - Pay Plan
  - Short Work Break
  - Other Job Data entries
Fiscal Year End Best Practices

- Ensure that all employees Fiscal Year 2014 funding has been updated through 6/30/2014
- Be aware that other HRS activities and their timing impact FYE
  - Pay Plan
  - Summer Prepays
  - Short Work Break
  - Job Data Changes
- C-Basis employees with prepaid insurance must have funding continuously in place over the summer to fund benefit payments, even though no salary is paid
- Submit salary cost transfers/direct retros now to avoid year end processing crunch
- Service Center is working to reduce salary cost transfers/direct retros due to default/suspense funding caused by:
  - Work Study setup
  - Off cycle paychecks
  - Calendar year end payroll, many a result of off cycle paychecks
  - Summer Prepaid Fringes because funding was not setup
- New hires/rehires/transfers at start of each semester
FYE - How Funding Is Populated

Manual Funding Entry

• Most accurate method of funding entry
• Recommended for complex funding entries (e.g., more than 4 funding lines)
• Optimal funding entry date is no more than 30-60 days in advance due to potential subsequent Job Data entries

Budget Import

• Project numbers must be included where applicable, otherwise budget import fails for that employee

Funding Rollover

• Convenient, but allows greater potential for future funding issues because rollover is artificially forcing system to insert data
• Mass Job Data row insertions (such as pay plan) in combination with funding row insertions require specific sequencing actions
• Only active employees have funding rolled over
• Only active department and projects will be rolled over
Department Level Funding

- Rolled over from previous fiscal year
- Recommended best practice is that each appointing department be setup with a department level funding
- Department level funding is generally intended to serve as a “stop gap” measure to prevent transactions that stop payroll processing for all employees at all campuses and to quickly identify payroll funding aberrations
- Recommend using a funding that is likely to remain valid for a period of several years in the future
- The Funding Edit Error Inquiry Report and the No Appt-Level Funding Report are intended to proactively identify transactions that are being charged to department level funding while a payroll is in calc
FYE – Payrolls That Cross Fiscal Years

Payrolls that cross FY14 / FY15

- 2014BW07A payroll for bi-weekly employees (6/29/14 – 7/12/14)
- 2014UNC07 V-Basis and S-Basis monthly payroll (A-Basis does not cross fiscal year)

Correct funding is extremely important for all employees on these payrolls

- Salary cost transfer processing for current fiscal year may no longer be available
- Funding as of June 30 is used for funding rollover
Payrolls That Cross Fiscal Years - Biweekly

**Biweekly Pay Schedule**
**Classified and Student Hourly**

<table>
<thead>
<tr>
<th>Pay Period</th>
<th>Pay Run ID</th>
<th>Pay Period</th>
<th>Pay Date</th>
</tr>
</thead>
</table>

**Fiscal Year 2014:**

- Populates funding for 6/29/2014 - 6/30/2014 of 2014BW07A pay period
- Funding is for 2/7 of Week 1 payroll if employee has an active appointment on 6/29/2014, even if employee did not actually work on 6/29 or 6/30
- A FY 2014 funding entry with an effective date of 6/29/2014 is needed if FY 2015 funding changes from FY 2014 funding if the entire 2014BW07A pay period should be charged to the new FY 2015 funding
- Entire pay period will be posted to FY 2015, whether or not funding is changing between fiscal years

**Fiscal Year 2015:**

- Populates funding for 7/1/2014-7/12/2014 of 2014BW07A pay period
- Funding is for 5/7 of Week 1 payroll plus Week 2 payroll, if employee has an active appointment as of 7/1/2014

*Funding Chart Fields Are Setup by Controllers Office (Accounting Services)*
### Payrolls That Cross Fiscal Years - Monthly

- **Campus:** Madison (AG1)

#### Fiscal Year 2014:
- Populates funding for 6/23-6/30 (S-Basis) or 6/26-6/30 (V-Basis) of 2014UNC07 pay period for employees with an active appointment at the start of the pay period.
- A FY 2014 funding entry with an effective date of 6/23 (S-Basis) or 6/26 (V-Basis) is needed if FY 2015 funding changes from FY 2014 funding if the entire 2014UNC07 pay period should be charged to the new FY 2015 funding.
- Entire pay period will be posted to FY 2015, whether or not funding is changing between fiscal years.

#### Fiscal Year 2015:
- Populates funding for 7/1/2014 – through end of pay period.
- Funding Chart Fields Are Setup by Controllers (Accounting Services)

<table>
<thead>
<tr>
<th>Pay Run ID</th>
<th>Pay Group</th>
<th>Period Begin Date</th>
<th>Period End Date</th>
<th>Payment Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014UNC07</td>
<td>ARG A-basis</td>
<td>07/01/2014</td>
<td>07/31/2014</td>
<td>08/01/2014</td>
</tr>
<tr>
<td>Crosses Fiscal Year</td>
<td>Summer Session</td>
<td>06/23/2014</td>
<td>07/20/2014</td>
<td>08/01/2014</td>
</tr>
<tr>
<td>Crosses Fiscal Year</td>
<td>Summer Service</td>
<td>06/26/2014</td>
<td>07/25/2014</td>
<td>08/01/2014</td>
</tr>
</tbody>
</table>
Tip: How To Save Funding Entry Criteria

- Saving Funding Entry Criteria for Efficient Entry
- Can be setup for a variety of situations; this example is for two fiscal years
- Navigation: Set Up HRMS>Product Related>Commitment Accounting>Budget Information>Budget Funding Data Entry
- *Hint:* Save this navigation as a favorite
Tip: How To Save Funding Entry Criteria

- Saving the Search Criteria

```
Funding Data Entry
Save Search As

Name the search and then click Save.
Name of Search: FY 2014

The saved search will contain these values:

SetID: begins with SHARE
Business Unit: begins with UWMIL
Department: begins with
Fiscal Year: = 2014
Budget Level: = Appointment
Position Number: begins with
EmplID: begins with 00000000
Empl Rcd Nbr: =

Save
Return to Advanced Search
SAVE
```

- Repeat steps for Fiscal Year 2015
Tip: How To Save Funding Entry Criteria

- Using Saved Search Criteria
- Hint: ALWAYS copy Empl. ID from any available electronic source (e.g., Job Data, a spreadsheet, an e-mail, etc.)

Select Fiscal Year from Drop Down

Double click the 8 zeros; paste Emp. ID; press Enter

Funding entry screen will immediately display
Future HRS Coordinator Meetings

- Thursday May 22
- Thursday June 26
- 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