HR User Group Meeting Agenda
South Meeting Room, Newcomb Hall
September 3, 2015 at 10:00 am

I. Welcome – Darrell Kozuch, Assistant Vice President, Human Resources

A. Recognition of New Users

B. UHR Staffing Changes:

Joanne Hoagland accepted the new Health and Welfare Benefits Program Manager position in Total Rewards effective August 24th. Joanne was formerly a Benefits Associate in UHR.

Shanna Dews left Human Resources on August 31st to take an HR Associate position with the Athletics department.

Carrie Crush, who previously worked at the School of Medicine, joined our team as an HR Operations Associate on August 24th.

Jessica Hatfield who previously worked at the School of Medicine, joined our team as an HR Consultant on August 24th.

Elizabeth Carey moved from the Meeting and Event Coordinator position to the Employee Recognition Specialist effective August 10th.

Andrea Haley has been promoted to Manager in HR Consulting Services effective August 24th.

David King moved from the Special Projects Manager to Retirement Plan/Financial Wellness Program effective August 10th.

Christina Landes who was previously a Senior Training and Development Specialist moved to the Senior Human Resources Generalist position effective August 24th.

Alison Miller moved from the Compensation Manager to the Director of Total Rewards effective August 10th.

Bobbi Thibo has been promoted to Senior Human Resources Generalist effective August 24th.
Amanda Walsh has been promoted to the Manager of HR Operations effective August 24\textsuperscript{th}.

Ashley Feero moved from Benefits as a Benefits Associate to an HR Consultant effective August 10\textsuperscript{th}.

Please wish these employees well!

C. UHR Postings:

There are no Human Resources postings at this time.

II. Benefits

A. Benefits Open Enrollment: Open Enrollment for benefit changes will begin on Monday, October 5 and end on Friday, October 30, 2015. More detailed information will be discussed at our next HR User Group Meeting on October 6th.

B. Join Us for a Benefits Fair!

October 14: Academic Division Benefit and Wellness Fair, Newcomb Hall, 8 a.m. to 2 p.m.
October 15: Medical Center Benefit and Wellness Fair, Main Hospital, Dining Conference Room, 7 a.m. to 3 p.m.

Questions? Contact the UHR Service Center at AskHR@virginia.edu or call 982-0123.

III. Payroll – Darrell Kozuch


Note: The Payroll processing calendar is subject to change, particularly around holidays. If you print a copy of the calendar, always be sure you have printed the most recent version which is maintained on our web site.

- **Sunday, September 6:** HRMS Specialist and Salary Approver updates for 08/24 – 09/06 Bi-weekly (wage and salaried) must be completed in HRMS by 5 pm.
- **Tuesday, September 8:** Time worked (wage and salaried) and leave used (salaried only) entered and approved in SSTL and the Timekeeper Entry form for Bi-weekly 08/24 – 09/06 and LD Specialists updates must be entered in HRMS by 5 pm.
- **Sunday, September 20:** HRMS Specialist and Salary Approver updates for 09/07 – 09/20 Bi-weekly (wage and salaried) must be completed in HRMS by 5 pm.
- **Monday, September 21:** Time worked (wage and salaried) and leave used (salaried only) entered and approved in SSTL and the Timekeeper Entry form for Bi-weekly 09/07 – 09/20 and LD Specialists updates must be entered in HRMS by 5 pm.
• **Sunday, September 27:** HRMS Specialist and LD Specialist updates for 08/25 – 09/24 Monthly must be completed in HRMS by 5 pm.

B. **Inactive Payroll To/From Bi-weekly Payroll:** HRMS Specialists are reminded that if you are returning an employee to the Bi-weekly Payroll from the Inactive Payroll, the effective date of the change **MUST** be the beginning of the bi-weekly pay period. There is an automated process that switches employees from the Bi-weekly Payroll to the Inactive Payroll effective the beginning of the pay period after 12 consecutive pay periods of no payment. If you need to **MANUALLY** switch an employee from the Bi-weekly Payroll to the Inactive Payroll before the automated process would do it, the effective date of the change **MUST** be the beginning of the bi-weekly pay period. **Changes in payroll must not be made effective mid-pay period.**

C. **Reminder - 2016 Payroll Calendar:** The 2016 Payroll Calendar is available on our web site at [http://www.hr.virginia.edu/calendars/2016-payroll-calendar/](http://www.hr.virginia.edu/calendars/2016-payroll-calendar/). Note that there are 26 bi-weekly pay dates in 2016 that will be reflected on the 2016 W2.

D. **Fringe Benefits:** A presentation on Fringe Benefits, what they cover and how they affect your budget.

E. **Reminder - 2014-15 Fringe Benefit Rates:** The proposal for the 2015-16 Fringe Benefit Rates has been approved to the Department of Health and Human Services (DHHS).

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<th>FY09 Rate</th>
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F. **September 7 Holiday:** Monday, September 7, will be observed as the holiday for Labor Day. Your supervisor or department administrators can answer questions about required coverage during the holiday. The 2015 Holiday Memorandum can be found on the UHR web site at [http://www.hr.virginia.edu/news-events/news/holiday-schedule-for-2014-and-2015/](http://www.hr.virginia.edu/news-events/news/holiday-schedule-for-2014-and-2015/)

G. **UHR Service Center Holiday Coverage:** Employees who need emergency assistance from UHR during the holiday can call our UHR Service Center at
434-982-0123 where a recording will give them the phone number for the “manager on duty” for that day.

H. 6 Year Anniversary! It has been six years since the implementation of Self Service Time and Leave (SSTL) and the bi-weekly payroll. The UHR Service Center was also launched six years ago.

I. Faculty Search Committee Seminar: Learn best practices for faculty searches on September 8th and 9th. Details can be found at http://uvacharge.virginia.edu/news-events.html.

J. 2015 W-2’s: Get your W-2 sooner! The online W-2 will be available mid-January, 2016, two weeks earlier than the paper version. If you don’t elect to get your W-2 online, your paper W-2 will not be mailed until January 31, 2016. Employees who have not elected to receive their W-2 online can expect an email soon with instructions on how to enroll.

K. Review Emergency Event Status and Policy: The winter inclement season will be here all too soon. It is important that managers convey to employees their “designated” or “non-designated” status as it applies to an Emergency Event. An employee may view their status via Employee Self-Service under “My Information”. The policy can be found at http://www.hr.virginia.edu/event-status. HRMS Specialists have the ability to update the Emergency Event Status which is contained in the Special Information Type named Emp-Emergency Event Status. The navigation path is People Enter & Maintain>Special Info. Managers may request that the Specialists make updates to this field. All new employees are defaulted to “Non-designated” and it is up to managers to get those employees who are “Designated” updated in the Integrated System, whether that is done by the manager him/herself via Manager Self-Service or by having their HRMS Specialist do the update. The employee’s Emergency Event Status is viewable in several Discoverer reports including PAY_Leave Balance (all tabs), HR_Employee Information for Labels, HR_Current Salary Information, and HR_Employees by Supervisor and Organization.

L. Affordable Care Act Reporting for University Academic Hourly Wage Employees:

It is important to manage Hourly Wage Employees in a few ways:

- **First:** when setting up wage employee on Goal pays please do not set them up at a standard 30 or 40 hours in the system. Use the actual anticipated hours they will work each week. Using the actual anticipated hours worked in the system will stop the 1500 hour accumulator up front from capturing an auto field of 40 hours.

- **Second:** If they are working in multiple departments ensure all pay in a week is coordinated so they are paid appropriately for all hours worked whether regular and/or overtime.

- **Third:** Managing time is also important for ACA reporting in two ways:
  - Hire date into a role will have a measurement period (initial measurement period), from First of the month following date of hire to the end of the
month one year later. Example: Hired June 10, 2015: The initial measurement period would be from July 1, 2015 through June 30, 2016.

- The October 3, through October 2, is the second measurement period captured for Hourly Wage Employees.

M. **Goal Pay Effective Dates:**

- New Hire – The effective date can be any day in the pay period as long as you collect the new employee’s identification, access the Employer I-9 site, and complete section 2 no later than the 3rd business day after the employee’s start date.

- Rehire – Can be any day in the pay period as long as you collect the new employee’s identification, access the Employer I-9 site, and complete section 2 no later than the 3rd business day after the employee’s start date.

- Adding a New Goal Pay Assignment to an Existing Employee – Can be any day in the pay period.

- Change to an Existing Goal Pay Assignment – **Must** be the 1st day of the pay period.

N. **Capturing Audit Report Data Semi-Annually:** UHR routinely receives requests for data that departments have access to via the Discoverer audit reports. UHR recommends that departments run each of the audit reports every 6 months since the data in the audit tables is not stored longer than 6 months. This is what we do in UHR. For example, users with the responsibilities of UVA ODS Specialist-Limited, UVA ODS Specialist-Limited Plus, or UVA ODS Specialist-Restricted have access to all of the audit reports in Discoverer. By running the audit reports every six months and exporting the results to Excel and saving to a departmental directory, the department would have access to the same data as UHR. If the department needed to know how many hires they did in the past calendar year or fiscal year, they could retrieve this information from the stored Excel file audit reports from the New Hire/Rehire Audit Report. It is recommended to run the audit reports for a 6 month period every January 1 and July 1 and export the results to Excel and save the results for future reporting needs.

O. **Reminder - Off Boarding Update:** Commonwealth of Virginia auditors recently reviewed University compliance with the off boarding program implemented in October, 2013. The off boarding program, including the off boarding checklist [http://www.hr.virginia.edu/other-hr-services/hr-consulting-services/toolkits/offboarding-toolkit/](http://www.hr.virginia.edu/other-hr-services/hr-consulting-services/toolkits/offboarding-toolkit/) for terminating and transferring employees, is part of a series of changes announced on April 21, 2014 designed to improve how we grant and control access to the Integrated System and other University information systems, property, and assets. While finding significant progress, the auditors noted that opportunities for additional improvements exist, and they will re-evaluate our compliance with the off boarding checklist procedure before the conclusion of their annual audit in September. Please take special notice of the following:
Timing
Managers/supervisors must complete the checklist at the time of the employee’s termination from the University or transfer to another University unit. Completing the checklist weeks or months after the employee’s departure does not accomplish the security goals of the Program. However, in those cases where an employee leaves unexpectedly without signing the checklist, it is permissible for a manager/supervisor to complete and sign the checklist on behalf of the employee, and to note that the employee was unavailable.

For questions regarding off boarding and the checklist, contact the Human Resources Service Center at 924-0123.

P. Reminder – 24th Annual United Way Laurence E. Richardson Day of Caring Wednesday, September 16, 2015: The Community Relations Office coordinates the University’s participation in the community-wide annual volunteer service day called the United Way Laurence E. Richardson Day of Caring. U.Va. employees engage in numerous service projects ranging from landscaping and painting to reading to children and visiting with elderly residents. On September 17, 2014, more than 1,000 U.Va. employees volunteered at nearly 100 projects in schools and non-profit organizations in Charlottesville, Albemarle, Fluvanna, Louisa, and Nelson during the United Way Laurence E. Richardson Day of Caring. Projects ranged from human services, tutoring, painting, office/organizing, landscaping, construction and arts and crafts. For more information, contact Lis Christian at 434-924-1321 or echristian@virginia.edu. Time spent volunteering for this event is considered hours worked and not charged to any type of leave on the timecard.

Q. Reminder - FICA Processing for the 2015 Fall Semester: The process that will switch student assignments for those enrolled in the 2015 Fall Semester to be exempt from FICA will be run on Friday, September 4th so that students enrolled for the Fall 2015 Semester beginning on August 25th will be FICA exempt for the Bi-weekly payroll #18 (08/24 – 09/06). If users encounter a situation where the FICA eligibility has not been properly handled, please contact the UHR Service Center at 982-0123 or email AskHR@virginia.edu.

R. Reminder - Review “Use/Lose” Leave: We are now past the mid-point of the Leave Year. Timekeepers are encouraged to remind their employees to view their “use/lose” leave information that can be found on the SSTL timecard in the Leave Information section by clicking in the drop down area. Timekeepers may also run the Discoverer Plus report PAY_Leave Balance for the tab named “Leave Management” for employees/managers. This report displays the same information as the Leave Information section on the SSTL timecard. The “Leave Management” report is not a required report for distribution to employees but Timekeepers should accommodate requests for the report. However, the report should still be run quarterly and distributed to managers.

S. University Leave Cash-Out: The University Staff leave program has a cash-out option for employees who have “use-or-lose” hours at the end of the leave year. These are the hours in excess of the maximum hours allowed for carry forward. Employees will be paid 50 percent of the value of the University Staff
leave that they lose, provided they have used a minimum of 10 days (80 hours) during the leave year ending December 27, 2015 (pro-rated for part-time University Staff). This minimum usage requirement is intended to encourage employees to take some time off to relax and rejuvenate. The cash-out payment may be received as taxable income or it may be deposited into a tax-deferred savings plan. After the processing for the final leave period of the year (December 27, 2015) is completed, a process is run for the carry forward of leave which identifies any amount above the carry forward limit for the employee. Any University Staff employee with an amount above the carry forward limit and who met the 80-hour threshold of usage will have a “payout” automatically created for half of the hours. This payout will be processed in the first pay period of the new leave year with pay period ending January 10, 2016 for check date of January 15, 2016.

T. Reminder - HR Appointment Expiration Report: HRMS Specialists are encouraged to run the Discoverer report HR_Appointment Expiration for their Organization(s) and use it to obtain the necessary information to update the appointment date information for their employees’ assignments. As of September 2, 2014 the statistics for expired appointments for Primary assignments are shown below.

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<tr>
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<td>Non-Paid Visiting Faculty</td>
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Expired appointments for Secondary assignments were:

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<tr>
<td>Non-Paid Visiting Faculty</td>
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IV. Organizational Excellence – Mary Brackett

V. Compliance and Immigration Services – Logan Hobbs

VI. Human Resources Service Center - Jon Williams

VII. Payroll and Timekeeping - Bess Landolt University Payroll

VIII. Floor Open for Discussion and Questions from the Audience

IX. Closing Remarks – Darrell Kozuch

X. Future Topics: Please send UHR any topics for future HR User Group Meeting agendas. They can be sent to AskHR@virginia.edu.
The next HR User Group meeting is scheduled for Tuesday, October 6, 2015, at 10:00 a.m. in the South Meeting Room, Newcomb Hall. Just a reminder that information pertaining to the HR/Payroll User’s Group is located at http://www.hr.virginia.edu/hr-for-you/hr-professionals/hr-users-group/.

**Inactive Payroll To/From Bi-weekly Payroll**

**History**: The ‘Inactive Payroll’ was created in July, 2004 in response to an audit request that we terminate or otherwise inactivate a bi-weekly wage employee’s assignment after they have not been paid in 12 bi-weekly pay periods. This helps prevent possible fraud, overpayment, payments on a wrong assignment, and reduces the number of assignments being processed in a payroll run.

An automated process is run with each bi-weekly payroll that moves bi-weekly wage employees not paid in 12 bi-weekly pay periods to the ‘Inactive Payroll’. Employees remain on the ‘Inactive Payroll’ for 6 months before another automated process terminates the assignment.

**Today**: In addition to the automated processes described above, there are scenarios whereby HRMS Specialists are allowed to ‘manually’ update the assignment for a bi-weekly wage employee to the ‘Inactive Payroll’. While UHR does not recommend this manual practice because of potential risks involved if not entered properly, it is allowed. The most common reason cited by HRMS Specialists in doing these manual updates is to stop the employee from creating a timecard and remove the employee from their missing timecard Discoverer report while the employee is temporarily not working in their department perhaps due to semester breaks. The employee is returning to work in the assignment within the next 6 months so they do not want to terminate the assignment, just temporarily inactivate it.

**Special Considerations for HRMS Specialists**:

If you need to MANUALLY switch an employee from the Bi-weekly Payroll to the Inactive Payroll before the automated process would do it, the effective date of the change MUST be the beginning of the bi-weekly pay period. The Assignment Change Reason must be ‘Term 180 Day (HR Use Only)’. This is the reason used by the automated process and you must use this same reason even though it says ‘HR Use Only’.

If you are returning an employee to the Bi-weekly Payroll from the Inactive Payroll, the effective date of the change MUST be the beginning of the bi-weekly pay period. The Assignment Change Reason must be ‘Return 180 Days’.

If it is known that an employee will be returning to the assignment at a future date, the HRMS Specialist may update the assignment with that future-dated action. This will prevent the automated processes from either placing the assignment on the Inactive Payroll or terminating the assignment that is already on the Inactive Payroll.

**MOST IMPORTANT TO REMEMBER, CHANGES IN PAYROLL MUST NOT BE MADE EFFECTIVE MID-PAY PERIOD.**

**Questions/Answers:**

*What do I do if one of my employees has been moved to the “Inactive Payroll” and I need to pay them?*
You would date-track on the assignment to the appropriate date for which you need to make payment, change the Payroll back to “Bi-weekly” in “update” mode, use Assignment Change Reason of “Return 180 Days”, and make any other necessary changes to the assignment and salary records. When the Bi-weekly payroll is run, the employee would be paid. Note: If the employee is not paid because no hours are submitted for the bi-weekly period, the process will move them again to the “Inactive Payroll” since they still will not have been paid in the last 12 bi-weekly pay periods.

What do I do if one of my employees has been terminated by the process?
You would need to Rehire the employee just like any other terminated employee.

What do I do if the assignment I need to pay on has been terminated?
You should add a new assignment record if the old assignment has been terminated by the Inactive Payroll process.

(rev) 09/02/2014

Fringe Benefits

The University of Virginia provides a full array of benefits to its faculty and staff that is either fully or partially funded by the University.

The government’s Department of Health and Human Services (DHHS) allows the university to use an allocation method that applies fixed rates based on employee groups. This is known as a “pooled fringe rate.”

A “fringe benefit pool” simplifies and improves the preparation and administration of budgets, including those associated with the grant proposal budget process.

To fund the University paid benefits, the University applies a fringe benefit rate to salaries and wages as they are paid and charged in the labor distribution (LD) accounting system (burdened). The fringe benefit rate that is applied depends on a number of factors listed below.

Please note that the pooled rates have no impact on the cost of the benefits to employees.

Each year, the University establishes with the federal government’s DHHS three (3) fringe benefit rates that are applied to salaries funded by government grants and contracts, including salary sources other than government grants and contracts (all other payments).

DEFINITION:
A collection of various benefits provided by an employer, which are exempt from taxation as long as certain conditions are met.

Fringe benefits Rate (FB)
We have four categories of Benefits that we include as part of our fringe benefit rate they are (Schedule E):
1) Retirement plan expenses (ORP, VRS & Employer Cash Match – for 403b/457 participants),
2) Health plan expenses & RHCC expense (Retirees Health Care Credit),
3) FICA, (Federal Insurance Contributions Act) / Medicare and OASDI (Old Age, Survivors & Disability Insurance, aka Social Security theses rates are set by Federal Government)
4) Other ... Life insurance, Disability insurance, Workman’s Compensation expenses, Supplemental Benefit Credit, Unemployment Insurance , Professional Development ($2,000.00 per employee), Work Med expense and Leave Pay Out expense (beginning FY ’15-’16).

These costs are expressed as a fringe rate by employee type, we have three types of employees and three FB rates:

Faculty - Faculty, Executive Staff, Part Time Faculty/Staff (PT) and Professional Research Staff
Staff – Classified and University Staff
Wage – Wage employees, Temp employees and payments made in additional to salary and wages such as Bonuses, leave pay outs, Overtime, goal pay, etc..

The Fringe Rate is the pooled costs of these benefits (noted above) divided by the total salaries in each employee class (Schedule C).