Payroll & HRIS Forum

February 24, 2021
Agenda

- Payroll Office
- Team Dynamix
- 1095C Forms
- COVID Leave
- RIT Changes
- Supervisor Codes
- Supplemental Contracts
- Taxation of Graduate Assistantships
- Talent Link
- Parental Leave
- Promotion from non-exempt to exempt

- Supplemental Compensation Accounts
- UD WorkForce Updates & Enhancements
- Additional Assignment Form
- Misc Job Code Updates
- W-2 Consent
- W-4 Out of State
- SEMU
- Essential Employees
- Records cleaning
Payroll Office

• **Staff Changes:**
  • Amanda Albertson - Associate Director of Payroll (replacing Diana Brinkley)
  • Veronica Pritchett - Foreign National Coordinator (replacing Cathy Taylor)

• **Upcoming Zoom Office Hours**
  • 3/22 11am-12pm
  • 4/19 10am-11am
Team Dynamix

- University has changed systems for service management from Footprint to Team Dynamix
- Responses from HR will be coming from services@udel.edu
- Website forms have transitioned to Service Request Forms
- Next steps:
  - HR Records (hrsystemsadmin@udel.edu)
  - Transition HR Paper forms to TD forms.
  - Class & Comp (hr-class@udel.edu)
1095C Forms

• 1095C forms will be mailed to eligible employees (employees who received health coverage from the University) no later than March 2, 2021.

• Form 1095 provides supporting documentation to indicate whether or not you had qualifying health coverage for the year. While you do not need to attach this form to your tax filing, please review it for accuracy. Please consult with a qualified tax advisor if you have questions about filing your tax return.

• The Payroll Office only issues 1095C forms for benefited employees. Questions about Student Insurance plans and 1095B forms giving to Students should be directed to University Health Plans at info@univhealthplans.com or call 800-437-6448.
COVID Leave

• New COVID Leave policy effective Jan. 1, 2021, available to all benefitted employees except those covered by the AAUP CBA.
• Through Dec. 31, 2021, the University provides up to 22 paid leave days for eligible employees who have tested positive for COVID-19 or have been instructed by a healthcare provider or public health professional to quarantine, isolate or monitor their symptoms.
• Employees should submit COVID leave requests via Time off Requests (TORs) in UD WorkForce using the new COVID leave bank. Learn more.

• For more information visit the HR Website
• Leave Actions Matrix
RIT Changes

• Effective 04/01 job rows will reflect return to Full-Time Annual Salary (in place for 4/15 Pay)
• The 5% reduction will be reflected as a Negative S-Contracts (Additional Pay Data) with a TRS Earnings Code (Temporary Reduction in Salary)
• Both changes will be mass loaded by HR
• Negative amounts will vary based on the number of days in the corresponding pay periods but will total the 5% reduction from April to June.
• Any changes to this process will be communicated to this group
# RIT Pay Stub View

## PAY STUB VIEW

### Employee Information:
- **Employee ID:** [Redacted]
- **Department:** [Redacted]
- **Work location:** [Redacted]
- **Paycheck location:** [Redacted]
- **Pay group:** SRG-Semimonthly Regular

### Pay Details:
- **Today's date:** 03/24/2021
- **Pay date:** 01/31/2021
- **Pay stub #:** 60683
- **Pay begin date:** 01/16/2021
- **Pay and date:** 01/31/2021
- **Net pay:** $1,383.28

### Hours and Earnings:

<table>
<thead>
<tr>
<th>Description</th>
<th>Hours</th>
<th>Earnings</th>
<th>Year-to-date</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Regular Pay</strong></td>
<td>0.00</td>
<td>2,811.29</td>
<td>5,482.00</td>
</tr>
<tr>
<td>Dental Credit</td>
<td>0.00</td>
<td>0.00</td>
<td>21.64</td>
</tr>
<tr>
<td>Life Credit</td>
<td>0.00</td>
<td>0.00</td>
<td>10.74</td>
</tr>
<tr>
<td>Medical Credit</td>
<td>0.00</td>
<td>0.00</td>
<td>356.35</td>
</tr>
<tr>
<td>Disability Credit</td>
<td>0.00</td>
<td>0.00</td>
<td>2.22</td>
</tr>
<tr>
<td>Vision Credit</td>
<td>0.00</td>
<td>0.00</td>
<td>2.21</td>
</tr>
<tr>
<td><strong>Temporary Reduction in Salary</strong></td>
<td>0.00</td>
<td>-140.58</td>
<td>-140.58</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>0.00</td>
<td>2,670.71</td>
<td>5,734.58</td>
</tr>
</tbody>
</table>

### Federal Tax Data:
- **Filing Status:** Single
- **Number of Allowances:** 2.00
- **Add'l %:** 0.00
- **Addl. amt.:** 0.00

### State Tax Data:
- **State:** Delaware
- **Filing status:** Single
- **Allowances:** 1.00
- **Addl. Amt.:** 0.00

### Taxes:

<table>
<thead>
<tr>
<th>Description</th>
<th>Current</th>
<th>YTD</th>
</tr>
</thead>
<tbody>
<tr>
<td>DE SWT</td>
<td>95.89</td>
<td>213.60</td>
</tr>
<tr>
<td>FICA</td>
<td>138.62</td>
<td>301.82</td>
</tr>
<tr>
<td>FICA-Med</td>
<td>32.42</td>
<td>70.54</td>
</tr>
<tr>
<td>FWT</td>
<td>202.82</td>
<td>492.11</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>469.75</td>
<td>1,077.87</td>
</tr>
</tbody>
</table>
Supervisor Codes

• Audit of supervisor table found there are numerous Inactive Employees on Active Supervisor codes
• We will be instituting a process which will notify Colleges and Departments of these cases so the Supervisor Table can be cleaned up
Supplemental Contracts

- Waiting on IRE for next Academic Year rates
- Proration of additional pay for enrollments above 25 students, in 1/25ths only applied to summer 2020
- Instructions and calculator are available online: http://www1.udel.edu/payroll/suppay/
Taxation of Graduate Assistantships

• Payroll taxes are assessed in identical circumstances for stipends provided to RAs, GAs, and TAs during the academic year (i.e., Federal, state (and local when applicable) income taxes are withheld, but FICA taxes is not as long as the student is enrolled in at least a half time course of study).
• Students on off campus graduate internships are not eligible for the FICA exemption.
• A new JobCode - 4E1002 “Grad Intern Off campus” was created for GAs Receiving funding through off campus internships
• Note: Students who work during the summer session and who are not enrolled and attending classes during the summer session are not exempt from FICA.
New Misc. Wage Job Code Updates

• Last Forum we reviewed the more descriptive Job Codes which have been created for Misc. wage employees.
• Current Misc. wage JobCode should not be used and will be inactivated.
<table>
<thead>
<tr>
<th>Jobcode</th>
<th>Department</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>4I1016</td>
<td>Misc Wage, Research</td>
<td>Recruit, screen and enroll research subjects in suitable studies/clinical trials. Schedule, and carry out day-to-day lab activities, procedures, and research studies.</td>
</tr>
<tr>
<td>4I1017</td>
<td>Misc Wage, Skilled Trades</td>
<td>Performs inspection, maintenance, repair and replacement of existing and/or new equipment: electrical, plumbing, HVAC, and door and window hardware as well as miscellaneous small carpentry work.</td>
</tr>
<tr>
<td>4I1018</td>
<td>Misc Wage, Information Technology</td>
<td>Assist with desktop support. Install peripheral devices.</td>
</tr>
<tr>
<td>4I1019</td>
<td>Misc Wage, Maintenance, Construction, Natural Resources</td>
<td>Maintains and repairs many types of maintenance equipment. Performs routine tasks such as feeding, watering, milking and breeding of farm animals.</td>
</tr>
<tr>
<td>4I1021</td>
<td>Misc Wage, Communications &amp; Marketing</td>
<td>Design and print concert programs. Prepare and write communication features. Assist in event planning which can include room assignments, designing diagrams, suggesting audiovisual equipment and recommending other support needs.</td>
</tr>
<tr>
<td>4I1022</td>
<td>Misc Wage, Transportation, Delivery, Moving</td>
<td>Patrols campus to enforce parking rules and regulations. Deliver departmental and residential mail daily. Operates motor vehicles, accessory equipment and forklifts.</td>
</tr>
<tr>
<td>4I1023</td>
<td>Misc Wage, Training &amp; Education</td>
<td>Plan, organize, design, develop, and deliver individual and/or group professional development training programs. Assists with scheduling all undergraduate classes and provides general academic support in answering student registration/advising questions.</td>
</tr>
<tr>
<td>4I1024</td>
<td>Misc Wage, Sports &amp; Recreation</td>
<td>Assist with Club Sports programs. Schedule practice, coordinate transportation, maintain records. Assist with organizing and delivery of fitness programs.</td>
</tr>
<tr>
<td>4I1026</td>
<td>Misc Wage, Creative Arts</td>
<td>Interpret artist drawings and vision; research techniques and methods to create prop and set dressing pieces. Photographs events for web site use, publications and other communications and marketing needs. Prepares and photographs students and staff for marketing purposes.</td>
</tr>
</tbody>
</table>
Talent Link

• There are now two job cards available to use in Talent Link; one for faculty openings and one for staff openings.
• The additional card will allow for an easier user experience as well as more robust reporting capabilities.
• Training sessions on the new card were well attended, but if anyone has any questions about the system they can always email asktalentlink@udel.edu and even set up a 1:1 training session.
Parental Leave

- Forms will be updated with additional questions regarding funding
- Distribution for Employees on Grants should be moved to a different line

Promotion from non-exempt to exempt

- Retirement Change Option
Supplemental Compensation Accounts

• Dedicated supplemental compensation accounts were created last year to assist with the proper identification of an employee’s Institutional Base Salary.

• Rather than use the same account code as the regular salary, the new account codes should be used in the LAM to accurately track all supplemental pay for UD employees (excluding summer salary for faculty paid via supplemental contracts).
<table>
<thead>
<tr>
<th>ACCOUNT</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>120210</td>
<td>Professional Staff Full-time Admin Supplement (Non S Contract) -- This account is used to record administrative supplement for full-time exempt employees</td>
</tr>
<tr>
<td>120310</td>
<td>Professional Staff, Part-time Admin Supplement (Non S Contract) -- This account is used to record administrative supplement for part-time exempt employees</td>
</tr>
<tr>
<td>121010</td>
<td>CHAIR ADMN SUPL (NON S CONTR) – This account is used to record administrative supplement for chairpersons</td>
</tr>
<tr>
<td>121020</td>
<td>CHAIR NINTH SUP (NON S CONTR) – This account is used to record ninths for chairpersons</td>
</tr>
<tr>
<td>121110</td>
<td>FACULTY ADMN SUPL (NON S CONTR) – This account is used to record administrative supplement for full-time faculty</td>
</tr>
<tr>
<td>121120</td>
<td>FACULTY NINTH SUP (NON S CONTR) - This account is used to record ninths for full-time faculty</td>
</tr>
<tr>
<td>121210</td>
<td>FAC P/T ADMN SUPL (NON S CONTR) - This account is used to record administrative supplement for part-time faculty</td>
</tr>
<tr>
<td>121220</td>
<td>FAC P/T NINTH SUP (NON S CONTR) - This account is used to record ninths for part-time faculty</td>
</tr>
<tr>
<td>121610</td>
<td>CTR DIR ADMN SUPL (NON S CONTR) – This account is used to record administrative supplement for center directors</td>
</tr>
<tr>
<td>121620</td>
<td>CTR DIR NINTH SUP (NON S CONTR) – This account is used to record ninths for center directors</td>
</tr>
<tr>
<td>124510</td>
<td>F/T NON-EX37.5 ADM SUP (NON SC) – This account is used to record administrative supplement for full-time (37.5 hrs/week) non-exempt employees enrolled in 403b</td>
</tr>
<tr>
<td>124610</td>
<td>P/T NON-EX37.5 ADM SUP (NON SC) – This account is used to record administrative supplement for part-time (less than 37.5 hrs/week) non-exempt employees enrolled in 403b</td>
</tr>
<tr>
<td>124710</td>
<td>F/T NON-EX40 ADM SUP (NON SC) – This account is used to record administrative supplement for full-time (40 hrs/week) non-exempt employees enrolled in 403b</td>
</tr>
<tr>
<td>124810</td>
<td>P/T NON-EX40 ADMN SUP (NON SC) – This account is used to record administrative supplement for part-time (less than 40 hrs/week) non-exempt employees enrolled in 403b</td>
</tr>
</tbody>
</table>
UD WorkForce – Updates & Enhancements

- Added—new COVID Leave Bank
- Added—link to review Time Off Requests to Submissions/Approval/Cancellations emails
- Added—link to review timesheet to approval reminder emails
- Updated—year end clear per COVID Policy for Eligible Staff and Faculty
- Updated—accrual limit per Amended CBA for AFSCME Union Employees
- Added—assignment description to approval screen
- Added—new report to manager reports “Total Hours with Funding information”
- Added—Time Off Request notifications are sent to individuals with delegated Manager & Timekeeper 1 assignment groups
- Added—Allow Non-exempt, non union Staff to edit their schedule on the timesheet
- Added—Allow Manager and Timekeepers to update funding on Holiday Time slices
- Reporting Job Aids per Role have been added to the Website Training Materials
Additional Assignment Form Revamp

• New and enhanced form Go Live March 15th
• Highlight of Enhancements include:
  – Overall better experience when processing Assignments
    • May be initiated as soon as JED is approved
    • Changes to Job Codes on existing assignments
    • Only Hourly Rates exceeding Maximum route to Class & Comp
    • Grad Office approvals
      – Better audits while processing (Job Codes by Sal Plan, Earnings Codes, Funding)
      – Auto Approval – no final Payroll Approval required
      – Ability to add attachments
• Training Job Aid will be available on ConnectingU
W-2 Consent

- Over 3,300 employees consented to having their 2020 W-2 received electronically
- Consent applies until withdrawn, not required each year
- Continue to encourage consent for upcoming years
- https://www.udel.edu/w2consent
- Access to online W2s:
  - Employees on Terminate and Suspended Status do NOT have access
  - All others may access W-2 Form electronically (Leave, Retirees)
W-4 Out of State

Reminder:

• Employees working remotely outside of the State of Delaware should review their state tax withholdings and consult with their tax advisor to determine if they need to update their W4 Form.

• Employees may be over withholding their Delaware State taxes but owe more taxes to their home state, and might not be eligible for state income tax credit paid to Delaware on the salary paid during that period.

• In that case, they will need to increase their home state withholdings (this option is available for MD & PA residents) or pay the taxes directly to the home state.

Note: The University cannot give tax advice to individuals. Every Employee’s income tax situation is different and unique. Employees should consult with your tax advisor before making any changes to their federal and/or state income tax withholdings.
Records Cleaning

- List of BOT employees not paid for more than 18 Months was distributed to departments
- HR will review and mass terminate the records in early March.
• 2020 launched new system
  – Reduce time on JED’s for grads on/off contract
  – Title change (on/off contract)
  – Termination
  – Extend funding

• Spring 2021 opens late April due 5/21
Essential Employees

- Fall 2020 rolled out revision to JED to capture if employee is designated as essential AND % of job which could be done remotely
- For no response we defaulted to non essential
- ANY JED update can update this field
Questions?