Welcome to HR Partners!
November 14, 2017
Agenda

• Payroll Hot Topics: W-4, Direct Deposit, & Web Time Entry
• Faculty Performance Appraisals in WorkforUM
• Staff Performance Appraisal Update
• Merit Pay Update: Focus Group
• Announcements and Deadlines
• Spin the Wheel!
Payroll Hot Topics:
W-4, Direct Deposit, & Web Time Entry

Judith Nance
Assistant Director, Payroll
W-4 Form

• Make sure Box 1, 2, 3 and either 5 OR 7 are complete. One may NOT have something in Box 5 (Number of Allowances) and “Exempt” in Box 7.

• Exempt means we will track and report wages to IRS, but NO Federal Income Tax will be withheld.

• If choose number of allowances (Box 5), the earnings and number of allowances will determine if any Federal Income Tax will be withheld per payroll.
**W-4 Form (cont.)**

- **Box 5 or Box 7**: Make sure either Box 5 or Box 7 are completed, but not both.
Authorization of Direct Deposit Form

• Please make sure form is completed, including Banner ID or SSN, Monthly or Biweekly, signature and date.

• We prefer for them to attach something so we are able to verify the routing number and account number, such as a voided check or a statement from the bank with the employee’s name, type of account, account number and the bank’s routing number on it.
Authorization of Direct Deposit Form

The University of Memphis, one of the Tennessee Board of Regents institutions, is an equal opportunity/affirmative action university.

| Name of Bank | Bank Routing Number | Account Number | Type of Account |
|--------------|---------------------|----------------|----------------|----------------|
|              |                     |                |                | Checking | Savings |

| Name of Bank | Bank Routing Number | Account Number | Fixed Dollar Amount | Type of Account |
|--------------|---------------------|----------------|---------------------|----------------|----------------|
|              |                     |                |                     | Checking | Savings |

| Name of Bank | Bank Routing Number | Account Number | Fixed Dollar Amount | Type of Account |
|--------------|---------------------|----------------|---------------------|----------------|----------------|
|              |                     |                |                     |                 |                 |

I hereby authorize the University of Memphis to direct the net amount and/or fixed dollar amount of my salary and wage payments to my bank account(s) as shown above, effective on the next pay (check payable). A prospective deposit, add-on, or offset check is attached for verification purposes. This authorization is not an assignment of my right to receive any funds. I understand that the University of Memphis, as the authorized recipient, shall be entitled to receive, in advance of any payroll processing, an updated bank account(s) as shown above. I understand that the University of Memphis may change its terms, conditions, and/or this form at any time without notice and that any change may affect my authorization or the University of Memphis’ ability or right to pay. If this request may be cancelled or changed by the proper execution of another authorization agreement, I also understand that this authorization may be terminated at any time by the University or employee. I authorize The University of Memphis to initiate withdrawal transactions from my account(s) in the event of an overpayment or erroneous deposit.

Employee Signature: ____________________________ Date: ____________

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Web Time Sheet Issues

• Please make sure your employee puts time ONLY on Shift 1, as that is only shift UM has.
  – To make sure that your employee has only entered 1 shift, you must go into EACH timesheet, not just Approve All.
  – The example below is what NOT to do. This actually causes errors on the payroll which we must fix.

| Earnings       | Shift | Total Hours | Total Hours | Total Hours | Total Hours | Total Hours | Total Hours | Total Hours | Total Hours | Total Hours |
|----------------|-------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| College Work   |       | 4.11        |             |             |             |             |             |             |             |             |             |
| College Work   | 3     | 3.25        |             |             |             |             |             |             |             |             |             |
| Total Hours    | 7.36  |             |             |             |             |             |             |             |             |             |             |
• Please make sure your employee puts time on correct lines.
  – Again, to get this done, one must go into the individual time sheet and approve it. Below are some examples for which we must get Adjustment Time Sheets to correct.

<table>
<thead>
<tr>
<th>Date</th>
<th>Time</th>
<th>Name</th>
<th>Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monday, Jan 2</td>
<td>7.5</td>
<td>John</td>
<td>1.0</td>
</tr>
<tr>
<td>Tuesday, Jan 3</td>
<td>8.0</td>
<td>Sarah</td>
<td>1.5</td>
</tr>
<tr>
<td>Wednesday, Jan 4</td>
<td>9.0</td>
<td>David</td>
<td>2.0</td>
</tr>
<tr>
<td>Thursday, Jan 5</td>
<td>7.5</td>
<td>Lisa</td>
<td>1.5</td>
</tr>
<tr>
<td>Friday, Jan 6</td>
<td>8.0</td>
<td>Mark</td>
<td>1.0</td>
</tr>
<tr>
<td>Total Hours</td>
<td></td>
<td></td>
<td>10.0</td>
</tr>
</tbody>
</table>
Overtime

• WTE does not calculate overtime for you, so remember:
  – 37.5 hours regular time
  – 2.50 hours straight overtime
  – Anything over 40 hours is premium overtime

• Overtime is not calculated on a daily basis, only on a weekly basis (Saturday – Friday).

• Each biweekly pay period contains 2 Saturday thru Friday periods.

• Holiday pay hours DO count as regular hours towards premium overtime, applicable during the work week in which the holiday fell.

• Sick Leave, Annual Leave, Jury Duty, Bereavement, etc. do NOT count towards premium overtime.
Overtime (cont.)

• Employee A is present at work for 30 hours in week 1, has 1 holiday, and took 1 day (7.5) as sick leave. The hours reported would be as follows:
  – 7.5 Holiday
  – 7.5 Sick Leave
  – 22.5 Regular Pay
  – 7.5 Straight Overtime

• Employee B is present for 37.5 hours in week 1, has 1 holiday and did not take any other time off. The hours reported would be as follows:
  – 7.5 Holiday
  – 30.0 Regular Pay
  – 2.5 Straight Overtime
  – 5.0 Premium Overtime
Questions
Faculty Performance Appraisals in WorkforUM

Meri Williams, Enterprise Application Services
Danny Linton, Human Resources
Beginning in January 2018, faculty performance appraisals will be completed within WorkforUM.
The previous homegrown Web application will be deprecated from use, though it will still be available as an archive.
Faculty appraisals will appear with the new Performance Management module within WorkforUM (the “purple side”).
Staff performance appraisals are unaffected and will continue to be performed in their usual location.
Faculty Performance Appraisals in WorkforUM

- Faculty appraisals follow this general workflow:
  - Step 1: Faculty members completes self-appraisal
  - Step 2: Chair receives self-appraisal, completes actual appraisal, routes back to faculty member
  - Step 3: Faculty member acknowledges appraisal, routes to Dean

- There is a separate appraisal from which Deans can evaluate Chairs.
Faculty Performance Appraisals in WorkforUM

DEMONSTRATION
Faculty Performance Appraisals in WorkforUM

• It is vital to keep chairs updated in WorkforUM; if your area gets a new chair and you do not see that chair reflected in the system, please alert Human Resources or Faculty Administrative Services.

• Troubleshooting: This is the one aspect of WorkforUM that is not managed by Human Resources. If you have questions/issues with faculty appraisals, please contact Meri Williams in ITS or e-mail facultyevals@memphis.edu.
Faculty Performance Appraisals in WorkforUM

QUESTIONS?
Staff Performance Appraisal Update

Danny Linton
Human Resources
Staff Performance Appraisal Update

• A number of changes are being proposed for the staff performance appraisal, in tandem with the University’s potential move to a merit/pay for performance system.

• Changes are not official until reviewed by focus group and approved by executive council.

• Due date of 2018 may shift from end of February and March to the end of April for both non-exempt and exempt.
Staff Performance Appraisal Update

• Overall 0-100 scoring would go away.
• 13 current variable factors would be reduced to 5-7 fixed factors.
• Scoring scale of 1-5 would be replaced by the following text responses:
  – Consistently Surpasses Expectations
  – Frequently Exceeds Expectations
  – Fully Achieves Expectations
  – Development Needed
  – Does Not Meet Expectations
Merit Pay Update: Focus Group

Iliana Ricelli, Human Resources
Merit Pay Update: Focus Group

- What process to follow? Goals? Position description? Other?
- How to get everyone to participate?
- Should merit accompany an across-the-board?
- What rating factors are important in an appraisal?
- What rating factors are directly related to a merit/bonus increase?
- Are numerical rating factors different than words describing performance?
- Who is willing to research other universities to help create a draft policy?
Announcements & Deadlines
Announcements & Deadlines

- New HR Employees
- New HR Partners
Announcements & Deadlines

- Current Job Openings
Announcements & Deadlines

• HR On the Road
• All employees should plan to attend a session
• Upcoming Sessions:
  – November 16, 2017: Lambuth Campus, Wisdom Parlor (9 a.m. - 1 p.m.)
  – November 29, 2017: University Center, Bluff Room (12 – 4 p.m.)
  – December 1, 2017: Law School, Wade Auditorium (9 a.m. - 1 p.m)
  – December 7, 2017: UC Theatre (12 – 4 p.m.)
  – December 14, 2017: UC Theatre - Physical Plant Employees (9 a.m. - 1 p.m)
Announcements & Deadlines

https://www.youtube.com/watch?v=vzfyXWAL1JM&authuser=0
Announcements & Deadlines

• 2017 Employee Charitable Giving Campaign
• Campaign begins Monday, October 16th
• Campaign runs through Wednesday, November 15th
• http://memphis.edu/ecgc
Announcements & Deadlines

• President’s Holiday Gathering
• Tuesday, December 12, 2017
• 9 – 11 a.m.
Announcements & Deadlines

• HR Open House
• Wednesday, December 13, 2017
• 9-11 a.m.
• Replaces December HR Partners meeting
Announcements & Deadlines

• At the October 4th meeting of the Board of Trustees, a motion for the development of a paid parental leave policy for faculty/staff was approved. Here are the next steps you can expect:
  – HR will be involved in the creation of this policy.
  – 6 weeks of paid leave (paid by the University).
  – Annual/sick leave will not need to be used.
  – Will be available for both childbirth & adoptions.
Announcements & Deadlines

- Career Milestone Awards
  Thursday, January 18, 2018
  University Center Ballroom
  10 a.m.

- Celebrating employees with 5, 10, 15, 20, 25, 30, 35, and even 40 years of service!
Announcements & Deadlines

- **Career Counseling Sessions**
- **Offered by Workforce Management**
- **November 15 & December 6**
- **Limited appointments available; sign up in Learning Curve**
Announcements & Deadlines

• IT Security Training Reminder
• Check E-Mails for Link
Announcements & Deadlines

• Customer Service Excellence Training
  November 28, 2017
  2 p.m.  AD177B

December 12, 2017
  2 p.m.  AD177B
Announcements & Deadlines

• Banner Navigation Training
  November 28, 2017
  10 a.m.  AD178

• WorkforUM Training
  January 24, 2018
  1:30 p.m.  AD178
Thank you for attending!
memphis.edu/hrpartners