

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.)

• If neither of the above situations applies, stop here and enter the number from line H on line b of Form W-4 below.

Separate here and give Form W-4 to your employer. Keep the top part for your records.

Form W-4 Department of the Treasury Internal Revenue Service	Employee's Withholding Allowance Certificate	OMB No. 1545-0074 2017
Whether you are entitled to claim a certain number of allowances or exemption from withholding is subject to review by the IRS. Your employer may be required to send a copy of this form to the IRS.		

1 Your first name and middle initial	Last name	2 Your social security number
Home address (number and street or rural route)		3 <input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Married, but withhold at higher Single rate. <small>Note: If married, but legally separated, or spouse is a nonresident alien, check the "Single" box.</small>
City or town, state, and ZIP code		4 If your last name differs from that shown on your social security card, check here. You must call 1-800-772-1213 for a replacement card. <input type="checkbox"/>
5 Total number of allowances you are claiming (from line H above or from the applicable worksheet on page 2)	6 Additional amount, if any, you want withheld from each paycheck	7 I claim exemption from withholding for 2017, and I certify that I meet both of the following conditions for exemption. • Last year I had a right to a refund of all federal income tax withheld because I had no tax liability, and • This year I expect a refund of all federal income tax withheld because I expect to have no tax liability. If you meet both conditions, write "Exempt" here
		8 [Redacted]

Under penalties of perjury, I declare that I have examined this certificate and, to the best of my knowledge and belief, it is true, correct, and complete.

Employee's signature (This form is not valid unless you sign it.)		Date	
8 Employer's name and address (Employer, Complete lines 8 and 10 only if sending to the IRS.)	9 Office code (optional)	10 Employer identification number (EIN)	

For Privacy Act and Paperwork Reduction Act Notice, see page 2.

Cat. No. 10220Q


Form **W-4** (2017)

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.**

Authorization of Direct Deposit
[Click here for online help.](#)

The University of Memphis Operating Policy No. [UM1341](#) provides additional information for completing this form.

Name: **Banner UIC:**

Dept:

Primary Account-Direct Deposit NET PAY Amount

Name of Bank:

Bank Routing Number:

Account Number:

Type of Account: Checking Savings

Secondary Account-Direct Deposit FIXED DOLLAR Amount

Name of Bank:

Bank Routing Number:

Account Number:

Fixed Dollar Amount \$:

Type of Account: Checking Savings

Third Account-Direct Deposit FIXED DOLLAR Amount

Name of Bank:

Bank Routing Number:

Account Number:

Fixed Dollar Amount \$:

Type of Account: Checking Savings

Bi-Weekly paid Monthly paid Check if this is a change

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 payroll possible. A preprinted deposit slip or voided check is attached for verification purposes. This authorization is not an assignment of my right to receive payment and revokes all prior payment direction notifications applicable to these payments. I understand that this request may be cancelled or changed by me upon proper execution of another authorization agreement. I also understand that this authorization may be terminated at any time by the University, or named bank. I authorize The University of Memphis to initiate withdrawal transactions from my account in the event of an overpayment or erroneous deposit.

Employee Signature Date

The University of Memphis, one of the Tennessee Board of Regents institutions, is an Equal Opportunity/Affirmative Action University.

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**

Faculty Performance Appraisals in WorkforUM

- 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

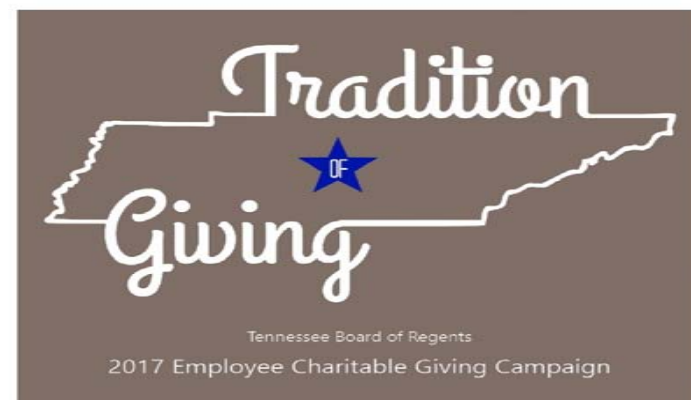
- HR On the Road
- All employees should plan to attend a session
- Upcoming Sessions:
 - November 16, 2017: Lambuth Campus, Wisdom Parlor (9 a.m. - 1 p.m.)
 - November 29, 2017: University Center, Bluff Room (12 - 4 p.m.)
 - December 1, 2017: Law School, Wade Auditorium (9 a.m. - 1 p.m.)
 - December 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

