



RED— Impacts of Single Payroll on Research Administration

August 2021

Introduction

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Agenda

- Single Payroll Background
- Tools and Resources
- Data Changes
- Research Admin Impacts
- WISER
- Current Issues
- Q&A

Single Payroll Background

- Decision by UW – System to simplify and standardize institutional payroll processes
- Starting July 18, 2021, all UW employees have been moved to biweekly payroll

Single Payroll – Tools and Resources

- RSP webpage
 - <https://rsp.wisc.edu/awardmgt/SinglePayroll.cfm>
 - Contains important research administration information
 - Links to external tools and references
 - FAQ section
 - Updated as new information is available
- Funding Layout Assistance Tool (FLOAT)
 - <https://hr.wisc.edu/docs/FLOAT.xlsm>
 - Excel tool developed by OHR to help with estimating funding splits
 - Currently works for up to 10 funding splits
 - Through January 2023

Single Payroll – Tools and Resources

- Payroll Calendar
 - <https://uwservice.wisconsin.edu/paycal/>
 - Starting with 7C payroll, will include a “Project/Dept ID SFS Deadline” entry
- Stay tuned for more!

Single Payroll – Data Changes

- Some payroll and HR related data is changing as part of the move to single payroll
- These data elements can appear in WISER or other reports

Single Payroll – Data Changes

- Pay Basis – No Change

Description	Pay Basis
Paid monthly, 12x / year, typically Empl Classes FA, AS, LI	A
Scholar/Fellow, Paid Stipend monthly, 12x / year, typically Empl Classes FA, AS, LI	A
Paid monthly, 9x / year, typically Empl Classes FA, AS, LI	C
Scholar/Fellow, Paid Stipend monthly, 9x / year, typically Empl Classes FA, AS, LI	C
Summer Session	S
Summer Service	V
Summer Service Fellow	V

Single Payroll – Data Changes

- Pay Groups – All New

Description	Pay Basis	Pay Group Code - Old	Pay Group Code - New
Paid monthly, 12x / year, typically Empl Classes FA, AS, LI	A	ARG	BAR
Scholar/Fellow, Paid Stipend monthly, 12x / year, typically Empl Classes FA, AS, LI	A	ARF	BAF
Paid monthly, 9x / year, typically Empl Classes FA, AS, LI	C	CAR, CBR, CCR, etc.	BCR
Scholar/Fellow, Paid Stipend monthly, 9x / year, typically Empl Classes FA, AS, LI	C	CAF, CBF, CCF, etc.	BCF
Summer Session	S	SAR, SBR, SCR, etc.	BSR
Summer Service	V	VAR, VBR, VCR, etc.	BVR
Summer Service Fellow	V	VAF, VBR, BCF, etc.	BVF

Single Payroll – Data Changes

- Compensation Frequency – All New

Description	Pay Basis	Comp Freq - Old	Comp Freq - New
Paid monthly, 12x / year, typically Empl Classes FA, AS, LI	A	M	B
Scholar/Fellow, Paid Stipend monthly, 12x / year, typically Empl Classes FA, AS, LI	A	M	B
Paid monthly, 9x / year, typically Empl Classes FA, AS, LI	C	9M	9B
Scholar/Fellow, Paid Stipend monthly, 9x / year, typically Empl Classes FA, AS, LI	C	9M	9B
Summer Session	S	9M	9B
Summer Service	V	9M	9B
Summer Service Fellow	V	9M	9B

Single Payroll – Other Changes

- Payment for Partial Pay Periods for Exempt Staff
 - $(\text{Bi-weekly Salary} / 10 \text{ (i.e. the number of workdays in the pay period)}) \times (\text{Days worked in the pay period}) \text{ days to be paid} = \text{amount to be paid for partial pay period}$
 - Workdays are normally Monday – Friday
- Appointment Start Dates
 - Change in guidance with move to single payroll
 - <https://tre.ohr.wisc.edu/documents/How%20to%20Determine%20the%20Effective%20Date%20for%20a%20Hire.pdf>

Single Payroll – Other Changes

- Encumbrances
 - Different calculation used for FY2022 only
 - Will result in original salary encumbrance amount that is visible in WISER being slightly lower than an employee's annual salary.
 - Result of the switch between monthly and biweekly encumbrance calculation methods in the middle of July
 - Future fiscal years should be correct
- Changing Funding in Middle of Pay Period
 - Not a change in policy
 - <https://kb.uwss.wisconsin.edu/29976> (Add a New Effective Dated Funding Row, step 3, Note details)

Single Payroll – Research Admin Impacts

- Cost Share
 - No impacts to SFS, though expecting that start and end dates of some payroll cost share schedules will need to be updated to align with biweekly payroll schedule
- ECRT/Effort
 - Effort performance periods will align with biweekly payroll schedule starting with the July to December 2021 period.
 - July to December 2021 period will be 7/1/2021 through 12/18/2021
- Fringe Calculation
 - Will be moving to a daily calculation beginning August 2021
 - Journals will use the same Journal ID Mask: FXxxxxxxx
 - When payroll or payroll transfers are posted, the related fringe allocation will then post the following day
 - May be some delays around UW fiscal year end

Single Payroll – Research Admin Impacts

- Tuition Remission
 - Program will be updated for payroll changes
 - Calculation frequency will remain at once a month
 - To determine eligibility and funding split:
 - It was decided to take the yearly comprate for monthly and 9 month and convert them to an hourly rate
 - The hourly rate will then be used (just like for hourly and bi-weekly) to calculate the number of working days in the month. The number of working days will then be multiplied by (8* hourly rate) to come up with the monthly comprate.
 - Standardized surcharge calculation for all eligible RA/PA/TA/LSAs
 - No January split issues going forward

Single Payroll – Research Admin Impacts

- Tuition Remission cont.
 - Monthly processing will be scheduled to run around the 5th of the following month instead of the last business day of the month. This will be considered an allowable post-period charge.
 - Reason is that with 2 week payrolls, the data for the month is not always available at the end of the month. Once all payroll data is in SFS, the process would be run.
 - Previous FTE fluctuation guidance (from June FMM) can be disregarded with the updated processing schedule.
 - Tuition remission surcharge workbook will be updated with new calculation
 - New workbook tool and processing schedule will be communicated and distributed to campus in late August
 - Go-live for September month end (run in beginning of October with new schedule)
- PI Financials Tool
 - Scenarios will account for biweekly payroll.

Single Payroll – Research Admin Impacts

- Training Grants and Fellowships
 - Looking into solutions for the overage issue
 - Goal is to not have students pay back stipends

Single Payroll – Research Admin Impacts

- Change to Payroll Guidance
 - Email send 1/12/2021
 - The determining factor in allocating salaries is the date(s) for which the individual has earned compensation. Those dates must be within the period of performance.
 - https://rsp.wisc.edu/policies/pay_schedules.cfm
- NIH Salary Cap
 - Matching funds must be available for all biweekly pay periods.

Single Payroll – Research Admin Impacts

- Advance Accounts
 - Bi-weekly payroll means more frequent paychecks and payroll deadlines.
 - Plan ahead and submit requests with plenty of lead time.
 - Project IDs must be generated in SFS by close of business days identified as “Project/Dept ID SFS Deadline” on the payroll calendar. To ensure the best chance of obtaining active project IDs in time for payroll, plan to begin process about 10 days in advance of deadline.

Single Payroll – Research Admin Impacts

- Summer Session and Summer Service
 - Issue was identified for summer session and summer service appointments
 - Payroll would be incorrect (normally underpayment) without intervention
 - Solutions were identified that would involve lump sum payments or a modification to the FTE % for the 8B payroll
 - HR staff have been instructed that for individuals paid on Grants, the FTE solution should be used as the lump sum solution would impact Cost Share and Effort
 - Vilas Awards will have a one-time, transitional exception to the new payroll guidance. Which means recipients can be appointed at the beginning of the 7M pay period rather than on 7/1.
 - Guidance and procedures for calendar year 2022 summer session and service are still under development

Single Payroll - WISER

- 7M and 7C pay dates will overlap

Jrnl ID	Jrnl Date ▲	SCT ID	Pmt Begin Date	Pmt End Date	Pay Run Descr	Pay Run ID
PJ00000467	07/15/2021	0	07/01/2021	07/31/2021	20210614-202108022021 Unclassified July	2021UNC07
PJ00000473	08/05/2021	0	07/18/2021	07/31/2021	20210718-202107312021 Biweekly Jul C	2021BW07C

Single Payroll - WISER

- Earn Dates Can be added, which will properly display the earn date ranges for the 7M and 7C

The screenshot shows a table with columns: Enc End Date, Enc Type, and Frequency. The table contains three rows, each with a 'B' in the Frequency column. A settings menu is open over the table, featuring a gear icon in the top right corner. The menu options are: 'Export to Excel' (with a download icon), 'Customize...', 'Records per page' (with a list of 25, 50, 100, and 500), and 'Include Earn Dates' (highlighted with a red box).

Enc End Date	Enc Type	Frequency
		B
		B
		B

Settings Menu:

- Export to Excel
- Customize...
- Records per page
 - 25
 - 50
 - 100
 - 500
- Include Earn Dates**

Single Payroll - WISER

- Payroll Search may return an additional row for converted employees on account code 1000 or 1545 in FY2022 due to some early encumbrance issues

Find Payroll Data Search Results

 [Pin to Dashboard](#)

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Empl ID/Rec Nbr	Job Title	Empl Name	Fund	Dept	Project	Program	Account	Total Paid	Begin	End	Pay Year	Orig Encumb.	Liquidated Amt	Encumb. Balance
████████	INFORM PROCESS CONSLT (S44DN)	████████	101	██████		4	1051: Academic Staff - Annual	\$3,957.30	07/01/2021	07/31/2021	2022	\$83,434.90	\$-3,957.30	\$79,477.60
████████	INFORM PROCESS CONSLT (S44DN)	████████	101	██████		4	1545: Univ Staff-Term Lv-Lump Sum	\$0.00	07/01/2021	07/31/2021	2022	\$0.00	\$0.00	\$0.00
								\$3,957.30				\$83,434.90	\$-3,957.30	\$79,477.60

Single Payroll - Issues

- Processing issues with salary cost transfers (PT journals) in the later part of July (7/22 and onward) caused issues with July month end processing
- Fringe transactions were posted, then they had to be reversed and recalculated

Questions

- How is effort changing?
 - ✓ Moving from two, six-month periods to two 26-week periods or 13-pay periods.
- What is happening with tuition remission?
 - ✓ Tuition will still run once a month, at the beginning of the following month, rather than the end of the current month.
- Will there be additional tools to support budgeting?
 - ✓ Yes, we are working on developing new tools which will help in budget prediction, salary cost transfers, etc.
- What about trainees and fellows?!?!
 - ✓ Here's what we know...



Other questions?

Contact Information

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Stay tuned for the RED Symposium Session on Single Payroll!