HR FORUM WELCOME

February 4, 2015

WORKING TOGETHER FOR THE GATOR GOOD
Agenda

- One.UF and Time Approval
- W-2 Information
- Glacier Tax Program for Internal F1/J1
- Immigration Services Updates and Reminders
- New Applicant Tracking System
- Processing and Records Updates
- Staff Performance Appraisals
- Benefit Reminders
- 2015 HRS Retirement Contribution Limits
- Vacation Leave Conversion
- Wellness Update
- myUFL Technical Upgrade
- Important Dates
What is ONE.UF?
- Self-service
- One Stop Shop
- User Experience
- Responsive Design
- Device Agnostic
- Not System of Record
ONE.UF

• Time Approvals Features
  o Groups: Static & Dynamic
  o Search
  o Approve individual line
  o Approve All for employee
  o Employee detail view
Mobile View
<table>
<thead>
<tr>
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<th>Group Name</th>
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<td>Adams, Linda K</td>
<td>31159950</td>
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<tr>
<td>Berry, Jerri-Ann C</td>
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<td>Chaddon, Helen Eirini</td>
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<td>Vega, Brandon Dee</td>
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Dynamic search returns partial matches
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<tr>
<th>UFID</th>
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<td>31159950</td>
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<tr>
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<td>07/11 FRI</td>
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<td>07/14 MON</td>
<td>8.00 HOURS TOTAL</td>
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<tr>
<td>07/15 TUE</td>
<td>8.00 HOURS TOTAL</td>
<td></td>
</tr>
<tr>
<td>07/16 WED</td>
<td>8.00 HOURS TOTAL</td>
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Summary: 4 DAYS | 32.00 HRS
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<thead>
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<td>HOL - Holiday</td>
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<td>THU</td>
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Adams, Linda K

ID: 31159950
Role: OFFICE MGR
Time Approval Demo
W-2 Information
2014 Year-End and 2015 Tax Updates

- Form W-2 Statistics and EYES
- Former Employees
- Department W-2 Access
- Form W-4 Exemptions
# Form W-2 Statistics

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<tr>
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<th>2014</th>
<th>2013</th>
<th>Change</th>
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<tr>
<td>Total W-2s Generated</td>
<td>35,645</td>
<td>35,002</td>
<td>643</td>
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<tr>
<td>Printed W-2s</td>
<td>12,167 (34%)</td>
<td>13,052 (37%)</td>
<td>(885)</td>
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- Of the 2014 printed W-2s, roughly 4,800 (39%) were for active employees.
- 2014 Electronic W-2s were made available January 21, 2015.
Employee Year-End Statement (EYES)

• In myUFL: *My Self Service > Payroll and Compensation > UF Employee Year End Statement*

• Provides detail of:
  - W-2, Box 1 reportable compensation
  - Taxes and other deductions
  - Total net pay
  - UF’s contributions on behalf of the employee
Former UF Employees

Terminating and former employees must keep their mailing addresses current in the UF Directory to receive any mailed W-2s and any leave cashouts less than $5,000, since these checks are mailed and not Direct Deposited.
Former UF Employees

- Employees with myUFL access:
  
  My Account > Update My Directory Profile
  
  - Both the Local and Permanent Home Data addresses should be updated.

- Employees no longer with myUFL access:
  “Former Employee Address Change Request Form” found on the HR website
Former UF Employees

- **(NEW for 2014 W-2s)** Former employees who maintain an active Gatorlink account (due to a continuing UF affiliation) have access to consent and retrieve their W-2s in myUFL Self Service, along with access to their paychecks.

- ~3,800 former employees with 2014 W-2s qualified for this access.
Former UF Employees

All former employee 2014 W-2s were mailed on January 30, 2015, along with the W-2s for any employees who did not consent for an electronic W-2.
Former UF Employees

W-2 Not Received?

• Allow sufficient time for U.S. Postal delivery (usually by February 9th)
• Request a duplicate W-2 to taxhelp@admin.ufl.edu or complete a “W-2 or 1042S Duplicate Request” form found on the Finance and Accounting website.
Department W-2 Access

- **UF_PY_PAYROLL_INQUIRY** role holders can view or print W-2s for their department’s current or former employees, as needed.

- In myUFL: *Payroll for North America > U.S. Annual Processing > Create W-2 Data > View W-2/W-2c Forms*
Department W-2 Access

Due to personal privacy concerns:

- You may **not email** the W-2, unless you have fully redacted the SSN.
- You may **not fax** the W-2 **internationally**.
- You may **fax** the W-2 **domestically** without redaction.
- You may **mail** the W-2 domestically or internationally without redaction.
Form W-4 Exemptions

- W-4 claims for exemption from federal withholding tax **expire February 15th** each year.
- Email reminders were sent on January 26, 2015 to employees who had not yet renewed their exemption or changed their W-4 for 2015.
Form W-4 Exemptions

• Renew your W-4 between January 1 and February 16, 2015 to claim exemption for the remainder of 2015.
• W-4 exemption is effective beginning the pay period in which it is claimed, if entered timely.

What if I don’t renew my W-4 by February 16th?
• On February 17, 2015, your W-4 will default to a previously-accepted (non-exempt) W-4 or to single with zero allowances, per IRS regulations.
W-2 Questions?

• W-2 FAQ

• taxhelp@admin.ufl.edu

• University Payroll and Tax Services
  (352)392-1231
Glacier Tax Program for Internal F1/J1 Students & Scholars
Immigration Services Updates
Immigration Updates

• Fall 2015 foreign national hires should already be in submission at ICS.

• Increased time lines and fees for rush cases. Plan ahead and avoid rush fees.
New Applicant Tracking System
New Applicant Tracking System

“GatorJobs”

- New vendor has been selected for the UF applicant tracking system (GatorJobs).
- Page Up People clients include:
New Applicant Tracking System
“GatorJobs”

- Estimated implementation June 2015.
- Improved applicant experience as well as an easier and more nimble system for hiring managers.
- Some features include: mobile and social recruitments, workflow automation, powerful reporting and analytics, and talent search.
- Simultaneously launching redesigned Job Portal

http://Test.urel.ufl.edu/_sandbox/jobs
New Applicant Tracking System “GatorJobs”

• In preparation for the new system, please close out all inactive searches.

• Due to the amount of completed and inactive recruitments that have not been closed out, we will no longer process ePAFs for new hires until the recruitment has been closed out in GatorJobs.
Processing and Records Updates
Additional Payments

• New Additional Pay Process went into effect in ePAF on December 18, 2014.

• Please refer to Additional Payment Policy and Earnings Code Guide for correct Earnings and Reason Code before entering ePAF.

• ePAFs submitted under the incorrect Earnings code will be recycled since some Earnings codes need additional information.

• Questions can be directed to the appropriate core office (Recruitment and Staffing, Academic Personnel or Student Employment).
Address Changes and W-4 Reminder

• Have employees update their address in myUFL prior to their last day of employment in both the Local Home Data and Permanent Home Data sections (My Self Service > My Account > Update My Directory Profile).

• If the address changes again prior to the time W-2s are mailed, former UF employees should update their mailing address by completing the Former Employee Address Change Request form.
Address Changes and W-4 Reminder…

• Current employee W-4 tax changes must be completed in myUFL (My Self Service > Payroll and Compensation > W-4 Tax Information).

• Paper W-4s need to be submitted for name changes only. Do not include any changes to W-4 withholding information on this form and include UFID on top of W-4 or on cover page.

• No other paper W-4s will be accepted as previously announced in October 2013.
Staff Performance Appraisals
Staff Performance Appraisals

- Annual performance appraisals for period March 1, 2014-February 28, 2015
- Appraisals must be presented and signed by March 31, 2015
  - Recommend planning on presenting second week in March
- Supervisors should give priority to documenting specific language and examples to outline the job performance and work-related behavior from throughout the year as well as develop goals for the coming year
Staff Performance Appraisals

- Two forms are used for evaluations
  - TEAMS Non-Exempt, USPS Non-Exempt and USPS Exempt Form
  - TEAMS Exempt Form (designed to accompany an evaluative narrative or letter)
- Both forms require an overall rating be assigned
- Should also include an outside activities disclosure section
Performance Appraisals
Reminders

• Use the appropriate form
• Ensure UF ID’s and correct full names
• Employees must sign and date the appraisal document
• If overall rating is “minimally achieves” or “below,” supervisors should contact Employee Relations before the evaluation is issued
• Employees employed fewer than 60 days or who are in probation period do not need to be evaluated
Performance Appraisals
Reminders Cont...

• Evaluation forms are available on the Employee Relations section of the HRS website.
• Supervisors should review position descriptions prior to issuing to ensure accuracy.
• Completed appraisals should be mailed to: Human Resources, Attn: Employee Relations, PO Box 110281, Campus
• Employee Relations assistance available from satellite offices:
  – IFAS: 392-4777
  – HSC: 392-3786
  – PPD: 392-2333
  – E&G: 392-6615
Benefit Reminders
Benefits Reminders

- Review insurance deductions to confirm they reflect Open Enrollment elections
  - OE changes for the following were reflected beginning on 1/9/15 check:
    - Medical/Dependent Care Reimbursement and Health Savings Accounts
    - UFSelect plans
    - GatorCare health plans

- Important Deadlines:
  - March 15------2014 FSA grace period ends
    - Continue to use for eligible expenses January 1 through March 15
    - Use it or lose it
  - February 28------Florida Prepaid Open Enrollment ends
    - Online enrollment
    - Payroll deductions available
Benefits Reminders

• Double deductions for nine and ten-month employees for state plans
  o Begin on Feb. 6 paycheck and continue through May 1
  o Normal deductions resume in September
  o If pay is interrupted prior to end of spring, employee should contact UF Benefits
  o Double deductions do not apply to UFSelect & GatorCare plans
Benefits Reminders

State Extends Benefits to Same-Sex Couples

• Legally married same-sex couples as of Jan. 6, 2015
  o Qualifying status change event window Tuesday, Jan. 6, 2015 through Friday, March 6, 2015
  o May enroll in a family plan
  o Must call PeopleFirst at 866-663-4735 to enroll

• If switching from GatorCare Domestic Partner coverage must contact UF Benefits at 392-2477 or email benefits@ufl.edu to terminate GatorCare.
2015 HRS Retirement Contribution Limits
2015 IRS Retirement Contribution Limits

- Elective Deferrals for 403(b) – all Roth and Tax-Deferred contributions combined: $18,000
- 457(b) Deferred Compensation Plan Annual Deferral: $18,000
  - The Calendar Year 2015 Worksheet to maximize voluntary retirement savings contributions is located on the Voluntary 403(b) Plans web page.
- Age-based Catch-up Contributions (age 50 by December 31, 2015): $6,000
- 415 Annual Addition Limit (employer + employee contributions): $53,000

For more information on the retirement limits: Retirement Limits Page
  - Human Resources Retirement webpage: http://hr.ufl.edu/benefits/retirement/
  - Human Resources Retirement Counselor: Call 392-2477 or email retirement@ufl.edu
Vacation Leave Conversion
Vacation Leave Conversion

• The annual conversion for accrued vacation leave over the maximum occurred after the pay period ending January 15, 2015.

• Accruals over the max amounts were converted to sick leave.

• Maximums are as follows:
  o TEAMS and out-of-unit faculty: 352
  o In-unit faculty: 480
  o USPS: 240

• Questions regarding leave: Email central-leave@ufl.edu or call (352) 392-2477
Wellness Update
• Sign up by Feb. 27
• Participants receive
  ✓ A free pedometer
  ✓ A 9-week training guide and planner
  ✓ Weekly emails filled with tips, encouragement and event info
  ✓ Option to join a private Facebook community for added support
• Participants in the three departments with the most registrants will receive free Get up and go! t-shirts
• Please help spread the word! Visit gatorcare.org/wellness/couchto5K.asp to learn more.
myUFL Technical Upgrade
myUFL Technical Upgrade

- Will affect HR, payroll and financial transactions
  - Primarily impacting “look and feel”

- “Go Live” is Monday, March 16
  - Starting 5 p.m. on Friday, March 13, much of the myUFL system will be unavailable over the weekend
myUFL Technical Upgrade

- Beginning Monday, March 16, employees will see look and feel (color, font choices, etc.) and, in some cases, functionality differences
  - Minor changes in Time and Labor in time and leave entry
  - Most functionality changes are related to Travel and Expense
myUFL Technical Upgrade

- No training will be required—though updated training will be available
- No action will be needed by department security administrators
- More info will be provided in March’s InfoGator and via targeted communications to users with specific security roles
myUFL Technical Upgrade

• On March 16
  o Big “popup” with “four things you will notice” message: Look and feel, Time and Labor (with tutorial/instructions), Travel and Expense info, etc.—up for five days
  o On sign-on page, reminder about clearing cache with link to instructions
myUFL Technical Upgrade

- On March 16
  - After signing on:
    - Pagelet with reminder – this is different, clear your cache, etc.
  - Related content expanded in Time and Labor to highlight differences (up for two weeks)
Important Dates

• Next HR Forum – March 4th
Thank you for attending the HR Forum!