UW Madison
2012 Summer Appointments
Funding Setup
Accounting Services

April 10, 2012
Funding Entry Steps

- Step 1: Verify Job Setup (Slides 3 – 13)
- Step 2:
  - Enter Summer 2012 Funding When a Funding Exists from Last Summer – FY2012 (Slides 14-15);
  - Enter Summer 2012 Funding When No Funding Exists from Last Summer – FY2012 (Slides 16-17);
  - If July Summer Payroll Funding will change: Need to Create Two FY2012 Records (Slides 18-19);
- Step 3: Enter Summer Funding for FY2013 (Slides 20-21);
- HRS-SFS Posting of Summer Payrolls (Slide 22).
Step 1: Verify Accuracy of Job Data

- **HRS Navigation to Job Data:** Workforce Administration > Job Information > Job Data
- Enter Employee ID
- At least two distinct Empl. Records must exist:
  - C-Basis (academic year appointment)
  - S-Basis or V-Basis (summer session or summer service appointment)
Step 1: Verify Accuracy of Job Data

Search and Select Empl ID, Record 0;

Note: Two Empl Records Exist Here.
Step 1: Verify Accuracy of Job Data
Go to Payroll Tab to View C-Basis Appointment

<table>
<thead>
<tr>
<th>Payroll Information</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Effective Date:</td>
<td>04/01/2012</td>
</tr>
<tr>
<td>Action:</td>
<td>Data Chg</td>
</tr>
<tr>
<td>Payroll System:</td>
<td>Payroll for North America</td>
</tr>
<tr>
<td>Pay Group:</td>
<td>CAR</td>
</tr>
<tr>
<td>C-Basis MSN No IC &amp; IC-18</td>
<td></td>
</tr>
<tr>
<td>Employee Type:</td>
<td>Salaried</td>
</tr>
<tr>
<td>Tax Location Code:</td>
<td>UWMSN</td>
</tr>
<tr>
<td>GL Pay Type:</td>
<td>UW Madison</td>
</tr>
<tr>
<td>Combination Code:</td>
<td>Edit ChartFields</td>
</tr>
</tbody>
</table>

Absence System: Absence Management

Holiday Schedule: HOLU U-Holiday
FICA Status: Subject
Unclassified C Basis

Click "Include History" button to activate ability to scroll through all changes made to Employee Record
Click "Next in List" to view next Empl. Record
Step 1: Verify Accuracy of Job Data

Payroll Tab

V-Basis Appointment = Summer Service Appt.

Pay Group: VAR

Sum Svc MSN No IC & IC 10

Holiday Schedule: HOLU, U-Holiday

FICA Status: Subject

Pay Group Eligibility: UWS_U_S, Unclassified Summer/Service

Exchange Rate Type: 

Use Pay Group As Of Date: 

Include History button allows to scroll through all changes made to Employee Record
Step 1: Verify Accuracy of Job Data
Payroll Tab
S-Basis Appointment = Summer Session Appt.
Step 1: Verify Accuracy of Job Data
Work Location Tab
Summer Job Is NOT Setup – Do Not Enter Funding Yet!
Step 1: Verify Accuracy of Job Data
Work Location Tab
Summer Job Is Setup – OK to Enter Funding
Step 1: Verify Accuracy of Job Data

Job Information Tab

Note: S-Basis Job will list “Summer Session”

Note: Box WILL be checked for S-Basis Summer Session jobs
Step 1: Verify Accuracy of Job Data
Compensation Tab

Effective Date: 05/28/2012
Action: Rehire - Summer Appointment

Compensation Rate: 4
Frequency: 9M 9M
Rate Code: 1 NAANNL

Currency: USD

Job Data
- Employment Data
- Earnings Distribution
- Benefits Program Participation
Step 1: Verify Accuracy of Job Data

UW Custom Tab

Note: Session is set at:
- FY for V-Basis only;
- Blank for S-Basis.
Step 1: Verify Accuracy of Job Data

CAUTION!!!!! Note 6 Empl. Records – Request very thorough review before entering funding!

Job Data
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

<table>
<thead>
<tr>
<th>Field</th>
<th>Operator</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>EmplID</td>
<td>begins with</td>
<td>00xxxxxxx</td>
</tr>
<tr>
<td>Empl Rcd Nbr</td>
<td>=</td>
<td></td>
</tr>
<tr>
<td>Name</td>
<td>begins with</td>
<td></td>
</tr>
<tr>
<td>Last Name</td>
<td>begins with</td>
<td></td>
</tr>
<tr>
<td>Second Name</td>
<td>begins with</td>
<td></td>
</tr>
<tr>
<td>Alternate Character Name</td>
<td>begins with</td>
<td></td>
</tr>
<tr>
<td>Middle Name</td>
<td>begins with</td>
<td></td>
</tr>
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</table>

[Include History] [Case Sensitive]

Search Clear Basic Search Save Search Criteria

Search Results

<table>
<thead>
<tr>
<th>EmplID</th>
<th>Empl Rcd Nbr</th>
<th>Name</th>
<th>Last Name</th>
<th>Second Name</th>
<th>Alternate Character Name</th>
<th>Middle Name</th>
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<tr>
<td>C00</td>
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<td>(blank)</td>
<td>(blank)</td>
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<tr>
<td>C00</td>
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<td></td>
<td>N (blank)</td>
<td>(blank)</td>
<td>(blank)</td>
<td>(blank)</td>
</tr>
</tbody>
</table>
Step 2: Entering Summer 2012 Funding for FY 2012
When a Funding Exists from Last Summer - Search for Last Year’s Funding Record

Set Up HRMS>Product Related>Commitment Accounting>
Budget Information>Budget Funding Data Entry
Funding Data Entry
Enter any information you have and click Search. Leave fields blank for a list.

Find an Existing Value  Add a New Value

- Dept. must match Dept. ID from Work Location tab
- Select “Appointment”
- Empl. Record for Summer Job
Step 2: Entering Summer 2012 Funding for FY 2012 When a Funding Exists from Last Summer

- After funding screen opens, click the \(<+>\) button to add a new row.
- Enter Effective date = job effective date and enter funding lines.
- Click Save.
Step 2: Enter Summer 2012 Funding for FY2012
When No Funding Exists from Last Summer: Do Add a New Value

- Dept. must match Dept. ID from Work Location tab
- Select FY2012.
- Select "Appointment"
- Empl. Record for Summer Job
- Click Add to Create FY2013 Funding
Step 2: Enter Summer 2012 Funding for FY2012 When No Funding Exists from Last Summer

- Enter Effective date = job effective date, and enter funding lines.
- Click Save
Step 2: If July Summer Payroll Funding Is Changed from June’s Funding
Need to Create a 2nd FY2012 Funding Record

First: Search an Existing Record under FY2012

Dept. must match Dept. ID from Work Location tab
Select “Appointment”
Empl. Record for Summer Job
Step 2: If July Summer Payroll Funding Is Changed from June’s Funding

Second: Create a 2\textsuperscript{nd} FY2012 Funding Record with New Funding

- After funding screen opens, click the \textcircled{Last} to add a new row.
- Enter Effective date = 6/25/2012 for summer session, 6/28/2012 for summer service.
- Enter funding lines and click Save.
Step 3: Enter Summer 2012 Funding for FY2013
Need to Do This for All Summer Appointments!!!

Set Up HRMS>Product Related>Commitment Accounting>
Budget Information>Budget Funding Data Entry

Find an Existing Value | Add a New Value

SetID: SHARE
Business Unit: UWMSI
Department: A481500
Fiscal Year: 2013
Budget Level: Appointment
EmplID: 00000000
Empl Rcd Nbr: 1

Dept. must match Dept. ID from Work Location tab
Select FY 2013.
Select “Appointment”
Empl. Record for Summer Job

Click Add to Create FY2013 Funding
Step 3: Enter Summer 2012 Funding for FY2013

- Enter Effective date = 7/1/2012.
- Enter funding lines and click Save.
SFS Posting of Summer Payrolls

- Summer Service (Pay Group V) payroll is posted to the current fiscal year: May – June posted to FY2012, July-August to FY2013.
- Summer Session (Pay Group S) payroll is posted to FY2013 only.
- We do not encumber Summer Session payroll.
- Funding must set up under appointment department ID as noted from Work Location tab of Job Data (See slides #9 and #14). If not, payroll will NOT be posted to the funding you have entered – it will be posted to the appointment department default funding.