



It “Pays” to Partner

June 2009

Update for Department Payroll Representatives – DUHS

Presented by: Corporate Payroll Services

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Agenda

- Transitioning to Paperless Pay Statements
- Leave of Absences and Payroll
- Requesting Manual Checks
- Gross Pay and Distribution Report
- Updates
- Financial Certification Program – CP Rep Track
- Case Studies
- Building Partnerships with Our Customers
- Questions and Answers





Transitioning to Paperless Pay Statements

As of June, how many Duke
employees do not receive paper pay
statements?

15,010 employees

13426 employees have accessed NC4 and W4

3951 employee have accessed direct deposit records

**Using Duke@Work is the best way to keep you
personal information protected!**



Transitioning to Paperless Pay Statements

- Effective July 1, all Duke University and DUHS employees with direct deposit will stop receiving paper pay statements.
- First pay periods:
 - July 17 – biweekly employees
 - July 25 – monthly employees
- Employees will receive email notification the day prior to pay day with a reminder that their pay statement is available for viewing. Check employee addresses to make sure the correct email address is listed in SAP. If not, work with OIT or DHTS to ensure the correct address is listed.
- Duke@Work can be accessed by any computer with an internet connection at any time except when a payroll is being executed.



Transitioning to Paperless Pay Statements

- PC Users
 - Foxfire 3.X
 - Internet Explorer 6, 7, and 8 with the compatibility view
- Max Users
 - Foxfire 3.X only
- Employees should have access within 24 hours of the hire date once the hire is processed.



Transitioning to Paperless Pay Statements

Departments should:

- Modify offer letters to include how pay statements are received.
- Make direct deposit a condition of employment for new employees and those transferring into the department.
- Modify departmental orientation to include an overview of Duke@Work.
 - Set up/change direct deposit via Duke@Work
 - Complete W4 and NC4 via Duke@Work

Exceptions:

- Paper direct deposit forms must be used for cancellations and foreign nationals without a SSN
- Paper tax forms required for foreign nationals, those claiming “exempt”, and individuals with greater than 10 exemptions on their NC4



Transitioning to Paperless Pay Statements

- Remind employees to keep their information protected.
 - Kiosks are available for viewing at HR and Payroll
 - Log-out after each use (two-step process)
 - Do not print to a common computer. Payroll representatives can print statements as necessary.
- Access to Duke@Work ends on the termination date. Terminating employees should download statements prior to termination.
 - If a terminating employee chooses to print paper statements, Corporate Payroll recommends printing the last statement for the preceding three years and the last few pay statements from the current year.
 - There will be a service fee for duplicates. Duplicates are printed on standard white, 8.5X11 paper.



Transitioning to Paperless Pay Statements

- Paper statements will be generated for terminated employees.
- The termination iForm will overwrite any current dated address changes that have been made in SAP.



Transitioning to Paperless Pay Statements

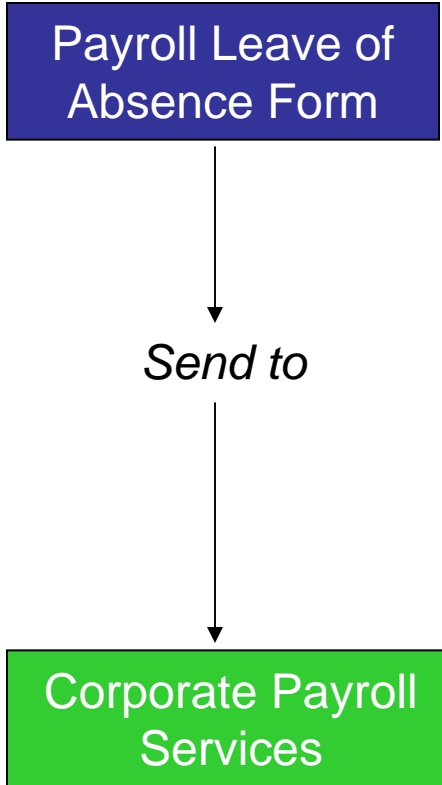
Questions to consider:

- Does everyone have access to a computer?
- Are printers secure?
- Do we need to change how we orientate employees in the department?
- Do our computers have compatible web-browsers?
- How does our internal pay statement distribution process change?
- Should direct deposit be a condition of employment for all new employees?



Leave of Absences and Payroll

Health Care Certification Forms – FMLA



Maintain in Employee Personnel File in the Department – Do Not Send to Payroll



Requesting a Manual Check

- Departments should call in requests for all manual checks.
- Send appropriate paperwork to the attention of the person whom you spoke with about the request. Write “Manual Check Request” on the top of the submitted paper work.
- Manual check requests will not be processed unless the department sends the appropriate paperwork **and** calls in the request.
- Deductions for medical, dental and vision can now be taken from a manual check and will be looked at on a case-by-case basis.
- All other deductions must be addressed by employees.
- The individual listed on the request form will receive a phone call when the check is available for pick up.
- Manual checks are not run on a daily basis and cannot be directly deposited into an employee’s bank account.



Gross Pay and Distribution Report

- Work is currently being done to transition this paper report to an electronic report.
- Cross-functional group met to discuss ideas surrounding the report:
 - Sent to SAP inbox of payroll representatives, business managers, and department heads
 - Forward the report from SAP inbox
 - Receive on Wednesday morning
 - Report assigned to position vs. person
 - Include service type/service category
 - More information on secondary employees
 - Would like some printing options
 - Naming convention of report to include pay period begin date and organizational key
- Currently working with programmers to determine how/if these suggestions can be incorporated.



Updates

- The biggest reason for manual check requests in DUHS is because PTO time is not being entered accurately.
- Employees should be recording PTO time on the department's adjustment/deviation sheet so that the Editor can enter time into ReportXpress.
- A new wage type is currently being designed for Staff Incentive Pay. It will show up as STAFFINC on an employee's pay statement and will be included in NSP on the Gross Pay and Distribution Report.



Updates

- A new Terminated Employee/Student Address Change Form is available on-line.
- The schedule for Salary Setting is currently being defined. It will follow the same timing as previous years.
- New formulas on payroll website:
 - Gross up calculations
 - Pay exception calculation
 - Accessible via the menu on the left side of the page under “Payments, Schedules and Fees”



Updates

- 2009/2010 Fringe Rates:

	Monthly Staff	House Staff	Hourly Staff	Students	PHD Students
Projected Non-federal	23.6%	15.3%	19.1%	7.7%	7.1%
<i>Projected Federal</i>	<i>21.7%</i>	<i>15.3%</i>	<i>18.5%</i>	<i>7.7%</i>	<i>7.1%</i>



Financial Certification Program – CP Representative Track

- Program launched April 2009.
- Test-out option is currently available for seasoned payroll representatives.
- To enroll you must have some type of payroll responsibility and approval from your supervisor.
- For more information, visit www.finsvc.duke.edu/fcp.



Certified Payroll Representatives

- Joy Glickenhau
- Kim Hall
- Amanda Edwards
- Carolyn Watson
- Ruth Boone
- Denise Privette
- Mickey Johnson
- Lara Mekeel
- Angela Bloemeke
- Thea Whitted
- Penny Triplett
- Nelissa Salvador
- Jennifer Newhouse
- Dana Auton
- Michael Flintosh
- Gwendolyn Purnell
- Ruby McDaniel
- Diane Butler
- Quita Marshall
- Carolyn Foshee
- Rikkia Smith
- Donna Brown
- Rebecca Francisco
- Kristen Rogers
- Catherine Cates
- Darlene Keith-Bernard
- Johanna Bernhardt
- Jennifer Becker
- Linda Richardson
- Wendy Knight
- Natalie Ward
- Gloria Moore
- Allison Resch



CASE STUDIES





Case Study 1

Sam is a biweekly employee in your area. He approaches you on a pay day Friday and informs you that he was not paid for a whole week of pay in his current check. Upon investigating the situation, you realize that he followed the appropriate protocol for requesting PTO, but that it was not handled appropriately by his supervisor. Sam's supervisor has requested a manual check for Sam since it was a departmental error. What steps would the department take to request a manual check in this situation? When would Sam receive his payment?



Case Study 1 Answer

1. Department completes a gross adjustment adding the PTO time to the payment.
2. Once the gross adjustment is complete, call in the manual check request to Corporate Payroll Services. Get the name of the person you spoke with on the phone.
3. Send the gross adjustment to payroll with “Manual Check Request” or “Off-cycle Check Request” to the attention of the person you spoke with on the phone.
4. Corporate Payroll Services will call when the check is available for pick up.



Case Study 2

1. What part of the Personal Structure determines the fringe rates that are charged for an individual?
Personal Subarea
2. Who should an employee contact with a question about a garnishment?
Corporate Payroll Services
3. Who should an employee contact with a question about a medical benefit deduction?
Human Resources
4. Who should an employee contact with a question about DUHS premium pay policy?
Department Payroll Representative/HR
5. Who should an employee contact with a question about his/her vacation/PTO time?
Department Payroll Representative



Case Study 2

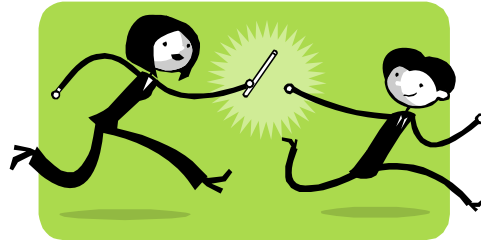
6. What paper work should you attach to a Payroll Leave of Absence Form when submitting it to Corporate Payroll Services?

No forms should be attached!



Building Partnerships with Our Customers

Help us to better partner with you!



- We use list serves to communicate critical payroll information to you.
- Is our communication strategy currently meeting your needs? Are we communicating too often? Not often enough? Are we communicating the right type of information to you?
- What action can the staff of Corporate Payroll Services take to better meet our customers needs?



QUESTIONS AND ANSWERS

