



It “Pays” to Partner

June 2009

Update for Department Payroll
Representatives – University and
School of Medicine

Presented by: Corporate Payroll Services

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Agenda

- Transitioning to Paperless Pay Statements
- July 2009 One-Time Payments
- Leave of Absences and Payroll
- Requesting Manual Checks
- Student Employees
- PostDoc Scholars
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- Updates
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- 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

What type of employee is currently required to have direct deposit?

All student employees



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 employees placed on a Leave of Absence or 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?



July 2009 – One-time Payments

- Department used salary setting to make payments to employees who are eligible for the 2009 one-time payment. Eligible employees working less than 40 hours per week will receive a prorated amount based upon their schedule.
- If you realize that you need to make a change to the one-time payment, contact your Management Center.
- **DO NOT** use green cards, gross adjustments, or supplements to make these payments or corrections to these payments.
- Biweekly employees – July 17 payment
- Monthly employees – July 24 payment



July 2009 – One-time Payments

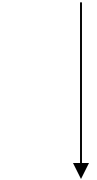
- All payments will be flat taxed and will show up on the pay statement as Paymnt1X.
- Flat tax rate:
 - Federal Tax Rate – 25%
 - North Carolina State Tax Rate – 6%
 - Social Security Tax Rate – 7.65%
- Unions will be paid per the specific union contract.



Leave of Absences and Payroll

Health Care Certification Forms – FMLA

Payroll Leave of
Absence Form



Send to



Corporate Payroll
Services



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.



Student Employees

- Having direct deposit is a condition of employment for all graduate and undergraduate students.
- Students who are working during the summer who will be enrolled as students in the fall are allowed to remain in student positions.
- Students who have graduated, should not be kept in student position after graduation. These individuals should be transferred into exempt/non-exempt positions as appropriate and are entitled to the benefits associated with that position.
- If departments do not have open positions in which to transfer these employees, departments should work with their recruiters to set-up the appropriate positions.



Postdoc Scholars

- There is a new classification for Postdocs: Postdoc Scholars – Paid Direct.
- Complete a paper termination form when the Postdoc Scholar will no longer be receiving payments. This triggers Corporate Payroll to terminate the individual's benefits.
- If the Postdoc Scholar will be moving to a compensatory position, he/she will need to enroll in benefits again under the his/her compensatory record.
- Benefits cannot be transferred between the compensatory and the noncompensatory payment systems.



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

- Employees who have selected the retirement incentive will receive a lump sum pay out of any vacation/discretionary holidays. No exceptions will be made.
- Currently a priority project has been identified for on-line time reports that will replace paper time cards. Cross-functional groups will be pulled together to design the system. It will only be available to those groups not using ReportXpress.
- A new Terminated Employee/Student Address Change Form is available on-line.



Updates

- 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%
Projected Federal	21.7%	15.3%	18.5%	7.7%	7.1%

- The non-Duke student personal subarea should not be used as a way to avoid fringes. This personal subarea should only be used by those areas with approval to use it.



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 Glickenhous
- 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
- 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 vacation, 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 vacation 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 Resource Information Center

4. Who should an employee contact with a question about a parking deduction?

Parking Services

5. Who should an employee contact with a question about his/her vacation/PTO time?

Department Payroll Representative



Case Study 2

6. Who should an employee contact if they believe they were over taxed on the one-time lump sum payment they received?

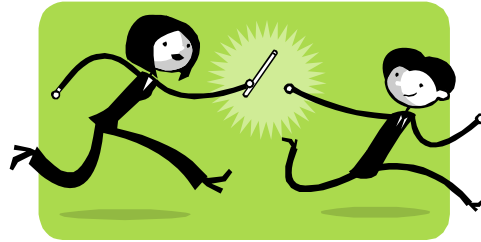
The IRS when they file 2009 taxes!

7. What paper work should you attach to a Payroll Leave of Absence Form when submitting it to Corporate Payroll Services? *There should not be any forms 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

