

# **Corporate Payroll Services**

***Overview for Business Managers –  
University and School of Medicine***

***August 2009***

# Agenda

- Objectives
- Statistics & Updates
  - Customer Interface Stats
  - Duke@Work Update
  - General Update
- Partnership Opportunities
  - Time card reminders
  - Prior period time cards
  - Student employees
  - Making payments to Foreign Nationals
  - Business process improvement suggestions
- Calendar Year End
- What's Coming?
- Questions and Answers

# Objectives

- To updated Business Managers on payroll related information and to solicit feedback on specific topics pertaining to paying Duke employees.

# Statistics and Updates

# Customer Service

- Customer Service Office Hours: 8:00am – 5:00pm
- 15,183 visitors to the Corporate Payroll Services office for the period October 1, 2008 through July 31, 2009
- Telephone Hours: 9:00am – 4:30pm Monday - Friday
- We will be implementing a new phone system in August that will improve our customer service levels through better call management and reporting functions.
- 1,934 emails sent to the payroll inbox from October 2008 – July 31, 2009.
- Drop box available 24X7 at 705 Broad Street.

# 2009 Training

- 79 sessions have been conducted between October 2008 – July 2009
- 1,359 participants attended the sessions
- New classes added:
  - Leave of Absence Training – Partnered with Staff and Labor Relations
  - Reconciling Payroll Reports
  - Payroll and Transfers
  - How to Complete a Gross Adjustment (Fall/Winter 2009)
- Launched the Financial Certification Program – Certified Payroll Representative (CPRRep) Track
  - Currently 45 Certified Payroll Representatives across Duke
- Reminder: All 2009 training sessions are posted on the Corporate Payroll Services website at [www.payroll.duke.edu](http://www.payroll.duke.edu).

# Duke@Work

- Effective July 2009, paper statements were discontinued for all employees who receive payment via direct deposit.
- Departments are encouraged to make direct deposit a condition of employment for new hires and for those employees transferring into new departments.
- Direct Deposit Changes: 2,582 since January 2009
  - June/July 2008 – 400
  - June/July 2009 – 1,182

**The Opportunity – 3,470 forms keyed by Corporate Payroll Services!**
- Tax Changes: 7,072 since January 2009
  - June/July 2008 – 1,249
  - June/July 2009 – 2,367

**The Opportunity – 2,774 forms keyed by Corporate Payroll Services!**

# Duke@Work

- PC Users
  - Foxfire 3.X
  - Internet Explorer 6, 7, and 8 with the compatibility view
- Mac Users
  - Foxfire 3.X only
- Accessible from any computer with internet access.
  - Need current version of Adobe Acrobat Reader
  - Allow pop-ups
- Employees should have access within 24 hours of the hire date once the hire is processed.
- 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.

# Duke@Work

## *What is coming?*

- Greater focus given to Duke@Work during new employee orientation
- Open enrollment – October 2009
- W-2 distribution – Will not be in place for 2010

# Updates

- Beginning September 2009, Corporate Payroll will launch a new form and new business process surrounding Payroll Leave of Absences.
  - Begin and end dates will be required for most types of leaves.
  - Departments will be able to use iForms for transfers and cost distribution changes.
  - Ensures that employees are returned from leave in a timely manner while reducing the paperwork departments are required to complete.

# Updates

- Gross Pay Distribution Report – ZH77 will be distributed electronically
  - Fall/Winter 2009
- 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

- Work is currently being done to design and develop a new time reporting system for areas who currently use paper time cards.
- An Advisory Committee with representatives from the University and School of Medicine is providing feedback.
- The time reporting tool will be accessed by using Duke@Work.
- Pilot implementation planned for spring of 2010.

# Partnership Opportunities

# Time Card Problems

What are the top reasons for time card errors?

- Missing Shifts
- Missing Tenths
- Missing Signatures/Employees and Departments
- Time off exceeds work schedule

# Time Card Problems cont'd

- Include DUID, organizational keys, and pay periods
- For secondary time records include DUID, organizational keys, effective dates, and position information for secondary time records
- Missing information for bereavement leave . Corporate Payroll Services edits time cards to ensure bereavement leave aligns with policy.
- If the holiday code is used on a day other than the holiday, a note must be provided indicating the holiday being represented by the holiday code on the time report.
- Make sure that your department adheres to published deadlines
  - 4:30 pm on Friday for employees not working the weekend
  - 10:00 am on Monday for employees working the weekend

# Prior Period Time Records

2009	
Pay Period 12	285
Pay Period 13	476
Pay Period 14	355
Pay Period 15	334
Pay Period 16	360
Pay Period 17	286

Total: 2,096

Average per pay  
period: 349

# Student Employees

- Direct deposit is a requirement for all student employees.
- Any student who refuses to set up direct deposit, should be terminated.
- Corporate Payroll Services contacts department payroll representatives on a routine basis with the names of student employees who have not set-up direct deposit. It is the department's responsibility to notify the student employee.
- Issues that continue to go unresolved are elevated to the Provost or School of Medicine as appropriate.

# Making Payments to Foreign Nationals

- Due to the complexities involved in issuing payments to foreign nationals, Duke has resources in place to provide assistance to departments.
- Paying Foreign Nationals incorrectly could result in serious issues for both Duke and the individual.
- **Before** making verbal and/or written agreements to Foreign Nationals, consult with Duke resources to determine the most appropriate way to issue the payment given the specific situation.

# Process Improvements

- Corporate Payroll is challenging itself to be more efficient and effective with our operations.
- We are analyzing business processes to determine if there are ways the we can streamline and simplify business processes for both ourselves and our customers.
  - New Payroll Leave of Absence business process and form
  - Simplifying Gross Adjustment form
  - Streamlining secondary position business process and form

What suggestions do you have for making payroll business processes more efficient and effective?

# Calendar Year End

# Returned Tax Form Statistics

- 1,000 W-2 Forms were returned for calendar year 2006
- 820 W-2 Forms were returned for calendar year 2007
- 898 W-2 Forms were returned for calendar year 2008
  - 606 were for biweekly employees.
  - 292 were for monthly employees.
- 79 1042s Forms were returned for calendar year 2008
- 870 duplicate tax forms were requested for calendar year 2008 as of July 31

# Process of Distributing Tax Forms

- Tax form distribution process:
  - Biweekly tax forms distributed by departments
  - Monthly tax forms distributed to the check mailing address
  - Tax forms for terminated employees are mailed to employee home addresses
  - Corporate Payroll will offer days for duplicates on-demand

# What's Coming?

- Duke@Work – New Hire benefits enrollment
- Calendar Year End – validate home addresses and check mailing addresses

# Questions and Answers

