UW System Human Resources, Payroll and Benefits Conference
Stevens Point, WI
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Session: HR Office Best Practices Panel Discussion

Panelists: Sheryl Van Gruensven and Kimberly Danielson (UW-Green Bay)
Madeline Holzem and Beth Hill (UW-LaCrosse)
Tim Danielson and Sabrina Johnson (UW-Oshkosh)

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1. **Discussion Point: Office Structure and Internal Communications in Human Resources**
    a. Under Legacy, the UW-Oshkosh payroll, benefits and HR areas were siloed. These have evolved with HRS, separated by classified and unclassified.
        i. The two groups meet weekly. Includes all staff that touches any part of the process. Many issues are too complex for one person so they problem-solve together and share ideas. Focus in on issue confrontation.
        ii. After HRS go-live, employees were confused about whom they needed to contact in HR/Benefits. By establishing clear contacts within the institution, a relationship is created between HR/Benefits and the division within the institution. Close relationships make it more likely that divisions will be comfortable bringing messy situations to HR in a timely manner.
    b. At UW-Green Bay, the HR Manager oversees payroll and benefits.
        i. This staff does HR entry, P&B transactions and daily HRS functions. Also have a recruiting team who communicates with the HR, payroll and benefits (via TAM).
        ii. HR manager meets weekly with staff. HR director meets with staff bi-weekly.
        iii. Process documentation gives areas a heads up on issues and staff changes. Helps to keep paperwork moving along.
        iv. HR communicates with the provost office and other areas of the institution.
    c. At UW-LaCrosse, HR does recruiting and contracting. Staff has worked together for a long time and communicates well with each other.
        i. Starting to document their processes more.
        ii. Try to reach to campus stakeholders with technology, although it has not been as successful as hoped. They meet regularly with budget.
        iii. Have weekly meetings. The front desk person is crucial.
        iv. Use shared email inbox.
    d. Mike Golmar summarized the issue by stating that it's clear that UW-GB has well documented processes as this is reflected in the low number of retros and corrections. The service center can see the benefit of improved communications within the institution between HR, payroll and benefits.
    e. Discussion

i. UW-Whitewater asked how they can get higher level staff (such as deans) to pass along HR hire/change/term information and needs to management? Beth stated that strong relationships are vital. At UW-LaCrosse, deans and chairs receive information from HR. HR asks to be on agenda for department meetings. At UW-Green Bay, the position review committee and provosts meet weekly as all hires must be approved. This provides regular access.

ii. UW-Milwaukee asked about workflow and electronic delivery. UW-LaCrosse uses shared file space but send all forms electronically. Scanned copies of appointment letters and PAFs are retained. At UW-Green Bay, re-appointment letters go from HR to the deans so there is little delay in getting the information.

2. **Discussion Point: Movement of HR Forms/PAFs**
   a. UW-LaCrosse sends forms electronically, except re-appointment letters (requires signature).
      i. HR able to see budget report to determine status of form. Facilitates quicker payment or heads up if chain of communication breaks down.
      ii. PAF shows percentage of appointment.
      iii. HR mngr approves PAF. Unclassified entered by HR asst. For classified, division sends PAF.
   b. UW-Oshkosh doesn't have electronic distribution but includes deadlines on forms.
   c. UW-GB the PA form has built in formulas to determine FTE and funding split percentages that calculate to match HRS.
      i. We send out monthly reminders to everyone who works on PA forms, giving them a deadline of when all PA's are needed in our office in order to be paid on the payroll
      ii. With our good relationships with departments, we are generally contacted by the department when they know that they will have a PA in late.

3. **Overloads**
   a. UW-LaCrosse, in response to audit, has overload lump sum payment form. Employee signs off that work is done before payment is made. Big change.
   b. Can no longer "time" payment.

4. **EJED – Terms and Rehires**
   a. Recurring theme: Be Proactive!
   b. UW-Oshkosh runs query monthly; more often in busy times of year.
   c. UW-Green Bay runs own report.
      i. Proactively reaches out employer when close to EJED. Usually extended by May.
      ii. Mostly has fixed terminal appointments; few fixed term terminal appts.

5. **Onboarding**
    a. UW-LaCrosse provided samples of their onboarding and offboarding documents.
        i. HR asst sends new employee an email packet and checklist.
        ii. Website has resources for new employees, as well as supervisors.
        iii. Communication plan for employee's first day and first week. After 30 days, system sends email to employee and supervisor about resources. Onboarding lasts a year.
        iv. For students, have employee verification form to be completed at sign-on. Asks if ready to work so I-9 process is completed.
        v. Have designated HR hours for assistance.
        vi. Follow up near task due dates.
        vii. Hold group orientations.
        viii. Have a "new employee" group.
        ix. Plans to revamp employee orientation online and create mentor program for new employees.
        x. Classified appt letter retained in HR. Unclassified apt letter kept in division.
        xi. After initial onboarding, follow up with employee at three months.
        xii. Has new supervisor training program. One session focuses on onboarding.
        xiii. Meet with employees on last day. Complete offboarding form; exit form.
        xiv. Separation checklist for supervisor.
        xv. Contact employee for final leave report.
        xvi. Hold employee's hand coming and going out.
        xvii. Find out where employee is going. Transferring?
        xviii. Watch term rows in on-demand so adjustments can be made.
    b. UW-Oshkosh – if students make connection within 6 weeks, more likely to stay. Applies this principle to employees.
        i. Week before start date, make welcome call. Answer questions – where to report, where to park…
        ii. In first 6 weeks, call again to check in. Anything employee wishes they had known sooner?
        iii. Comprehensive 12-month onboarding.
        iv. Classified Governance group approached HR to set up mentor program, which governance group runs. About one third of employees like to have a "pal".
        v. Organizational development and how onboarding fits into that component tends to be neglected. Need chancellor to create position.
    c. UW-Green Bay offers exit interview; information for supervisor.
        i. We have a Separation Form that employees must complete, it allows us to collect information, such as whether they are transferring to another UW or state agency, as well as when their last day worked is and last day on payroll.
        ii. We have a Separation Checklist for supervisors

iii. UWGB onboarding- our appointments must be entered into HRS prior to employees being able to receive email access; this helps promote timeliness of new hire paperwork.