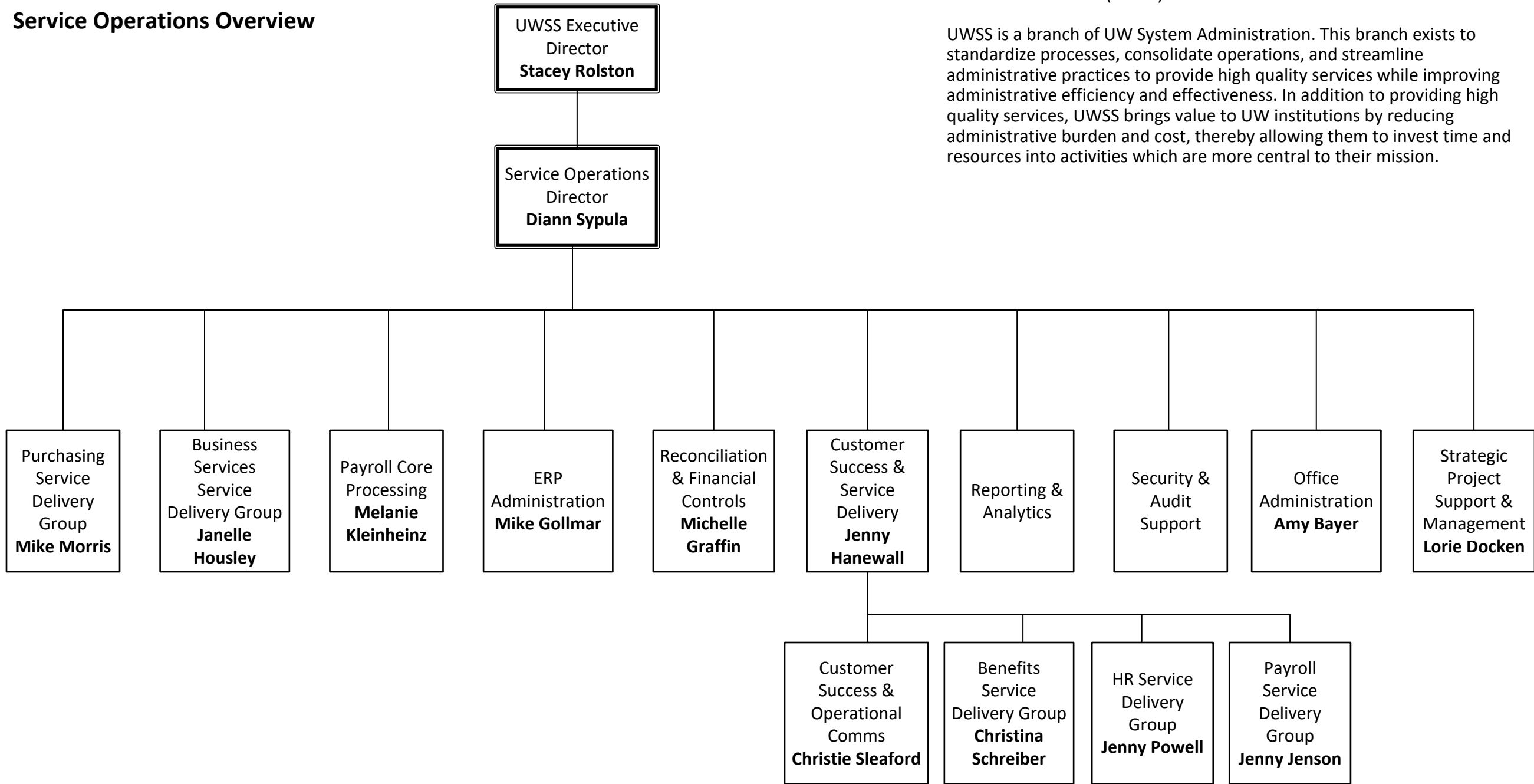


UW-Shared Services Service Operations Overview

UW-Shared Services (UWSS) Overview:

UWSS is a branch of UW System Administration. This branch exists to standardize processes, consolidate operations, and streamline administrative practices to provide high quality services while improving administrative efficiency and effectiveness. In addition to providing high quality services, UWSS brings value to UW institutions by reducing administrative burden and cost, thereby allowing them to invest time and resources into activities which are more central to their mission.



UW-Shared Services

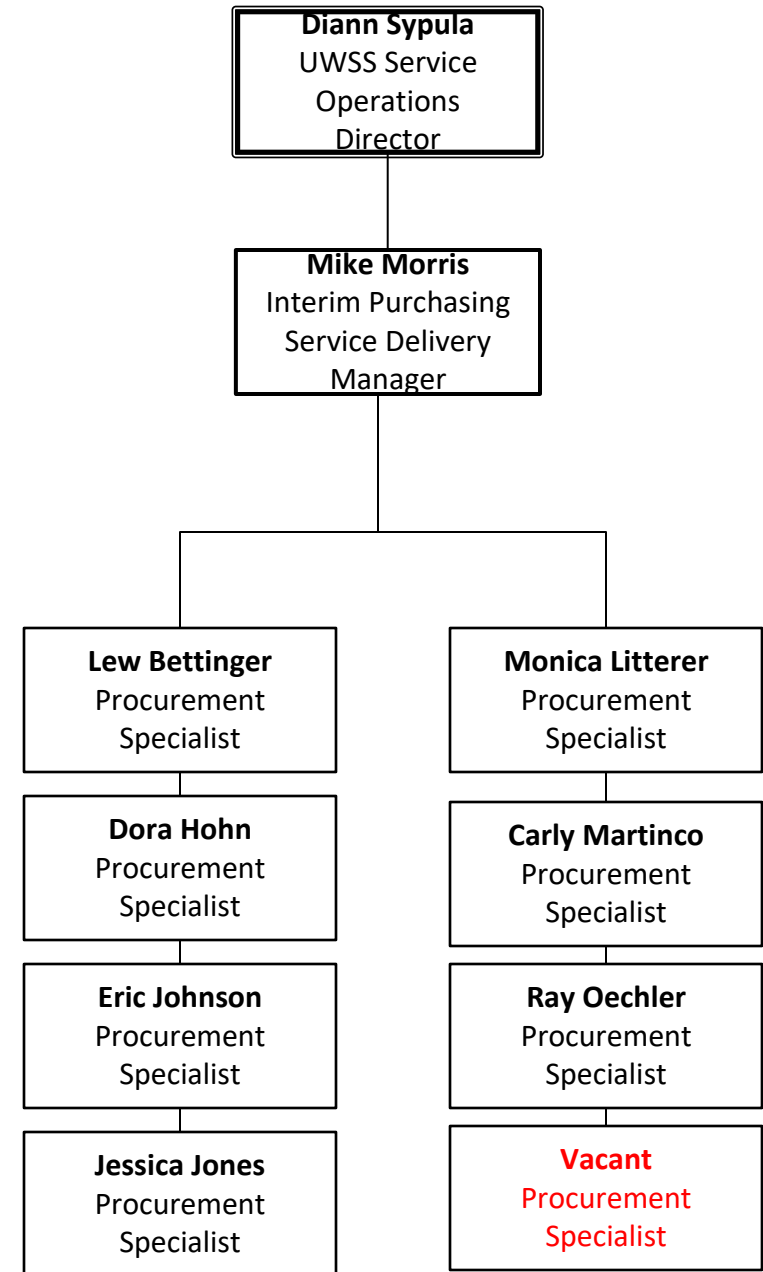
Service Operations

Purchasing Service Delivery

Purchasing Service Delivery

Services range from on-demand assistance to staff augmentation including full, ongoing Procurement support.

- Contract Review and Signature
 - Review, edit, negotiate terms and conditions and sign contracts with vendors on behalf of the institution
- Request for Bid (RFB) and Request for Proposal (RFP)
 - Provide advice on appropriate method of solicitation, work with institution Subject Matter Experts (SME) to develop requirements, and facilitate the review, rating, and choice of the submitted proposals
- Other Procurement Services
 - ShopUW+ support
 - Purchase order approval and dispatch

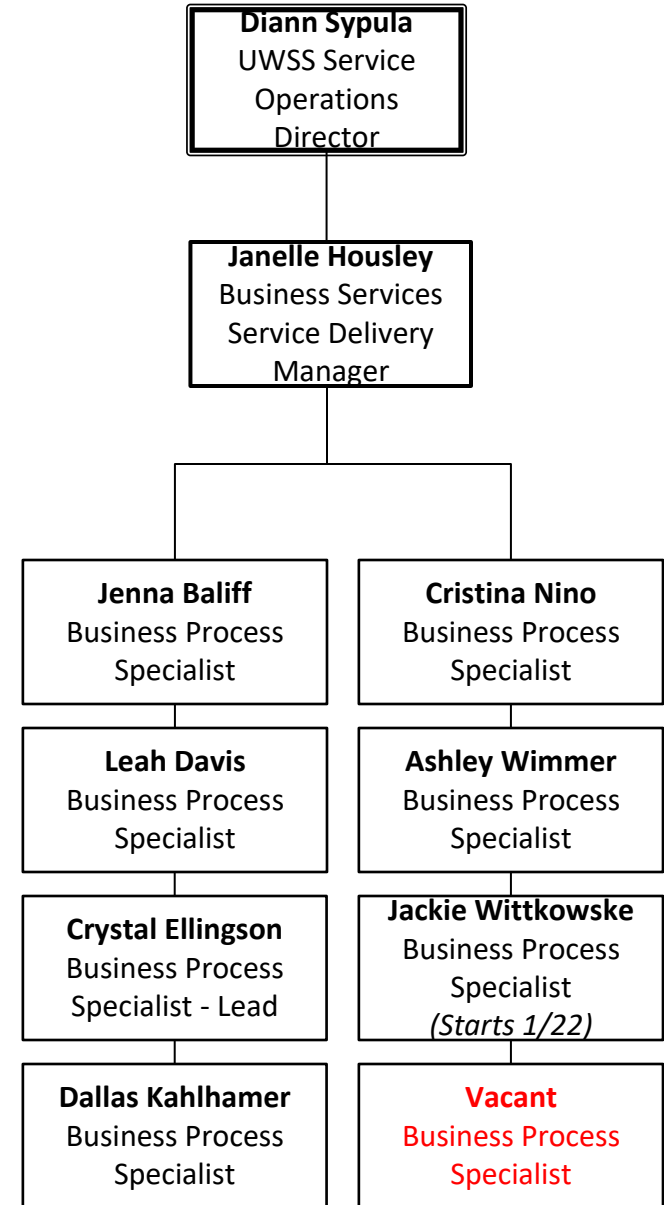


UW-Shared Services Service Operations

Business Services Service Delivery

Business Services Service Delivery

- Travel Expense Reports
 - Audit travel expense reports for accuracy and compliance with IRS regulations, State statutes and UW System policies prior to reimbursement
 - Work one-on-one with Travelers to offer guidance
 - Provide campus-level reporting
- Supplier Management Support
 - Provide new supplier administration to UW-Parkside
- Vehicle Usage Agreements



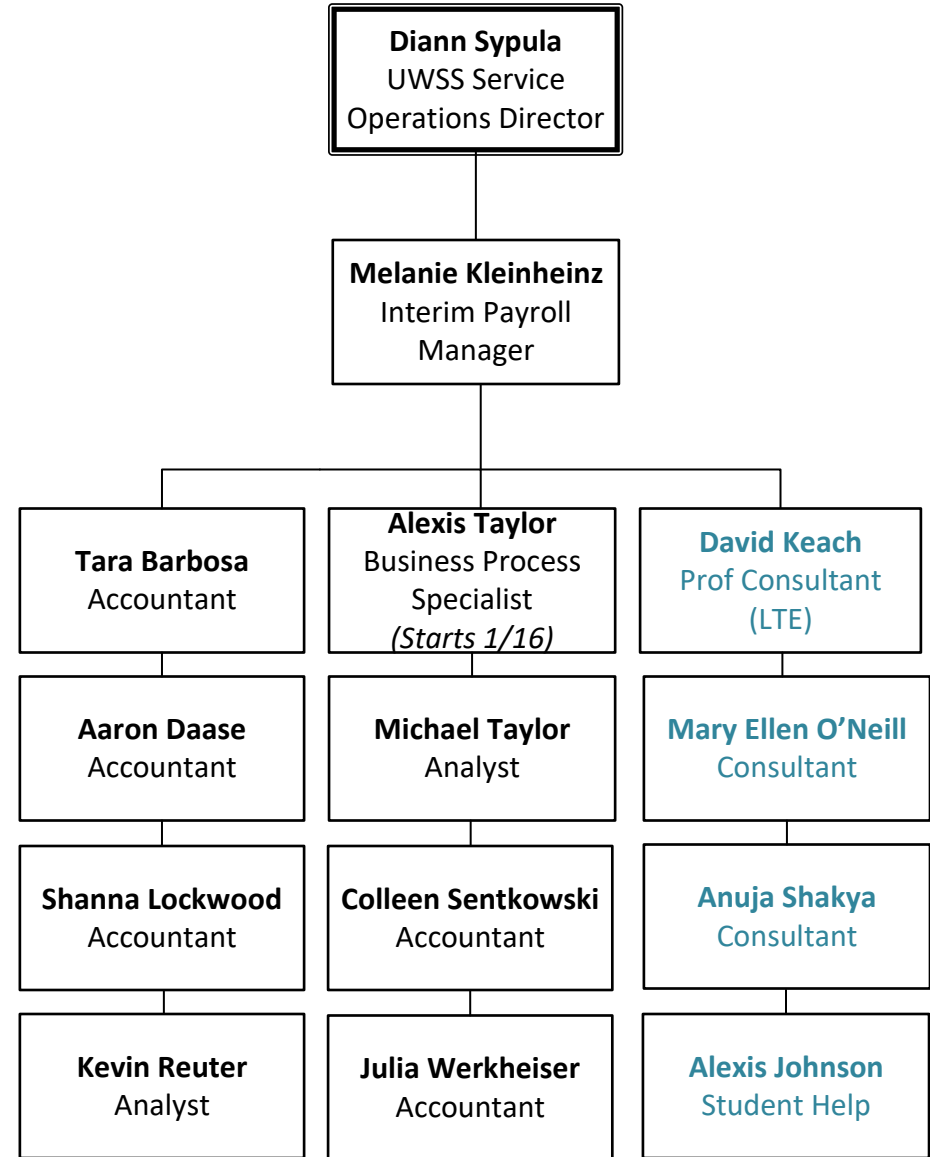
UW-Shared Services

Service Operations

Payroll Core Processing

Payroll Core Processing

- Deliver Biweekly payroll
 - Manage core payroll activity including time sheet processing and check/direct deposit/bank card issuance.
- Issue W2s
- Process W4s
- Foreign National Payroll
 - Gather data and monitor tax status for foreign national employees.
 - Manage Foreign Source Income processes and any required adjustments.
 - Issue 1042's



UW-Shared Services Service Operations

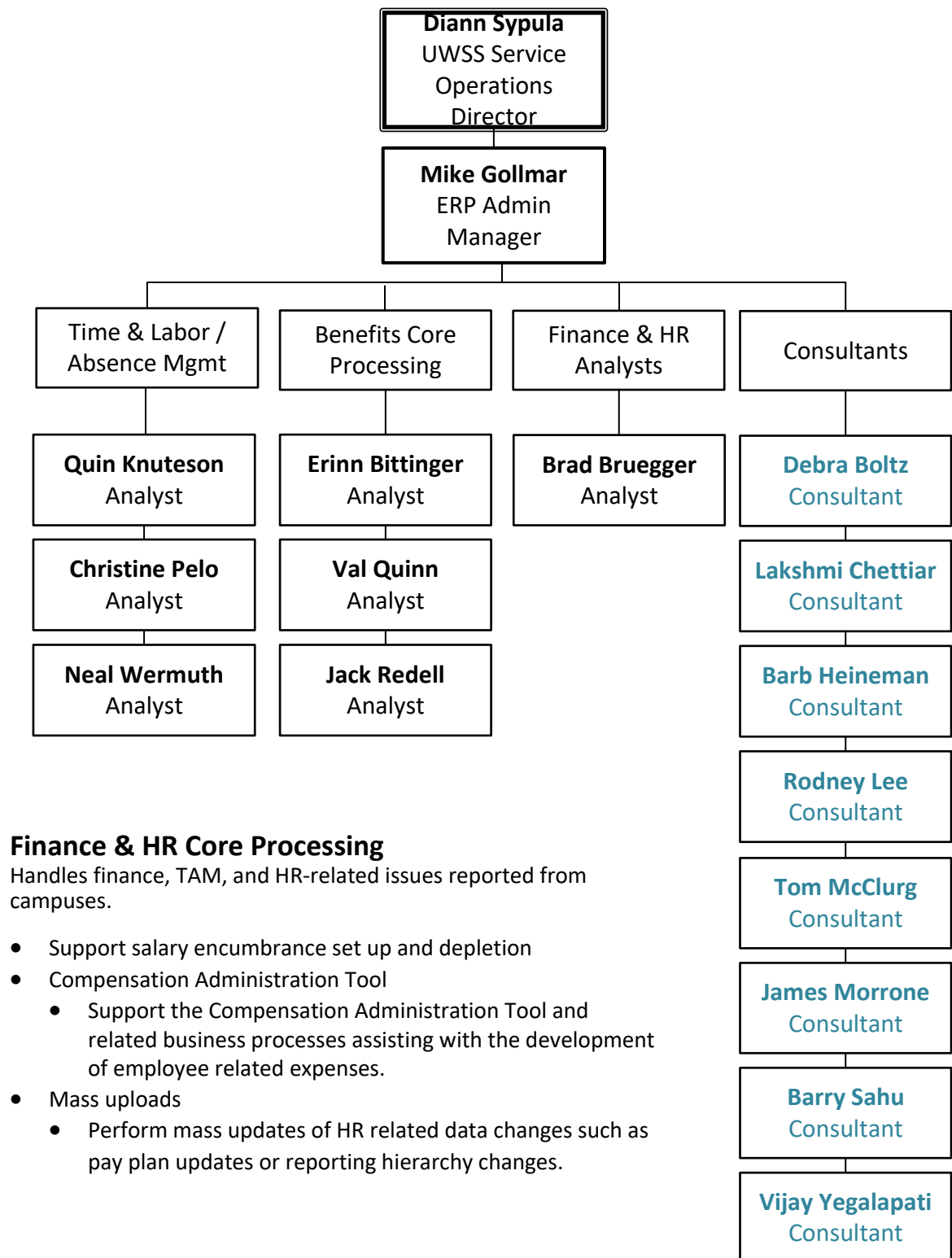
ERP Administration

Benefits Core Processing

- Facilitate Annual Benefits Enrollment
 - Manage overall event including system updates for plan changes, communications with employees, and coordination with UWSA's policy team and ETF
- Core Benefits Administration Processing
 - Support system processes related to eligibility, plan adjustments and rate changes, and employee enrollment
 - Coordinate with vendors to manage employees flexible / health spending accounts
- Summer Prepay
 - Manage the health premium deduction / payment process for 9-month employees
- WRS
 - Support business processes, data validation and reporting related to WRS and interactions with ETF

ERP & Time Administration

- Routine maintenance - release management
 - Apply security and compliance related updates as well as implementation of new and improved functionality
- Interfaces
 - Support appropriate data sharing with other UW and third party applications
- New functionality
 - Use new functionality as appropriate to improve business processes and end user experience
- Batch processing
 - Maintain and monitor scheduled batch processes assuring timely completion
- Performance
 - Monitor system performance and work with technical support to assure reasonable performance



Finance & HR Core Processing

Handles finance, TAM, and HR-related issues reported from campuses.

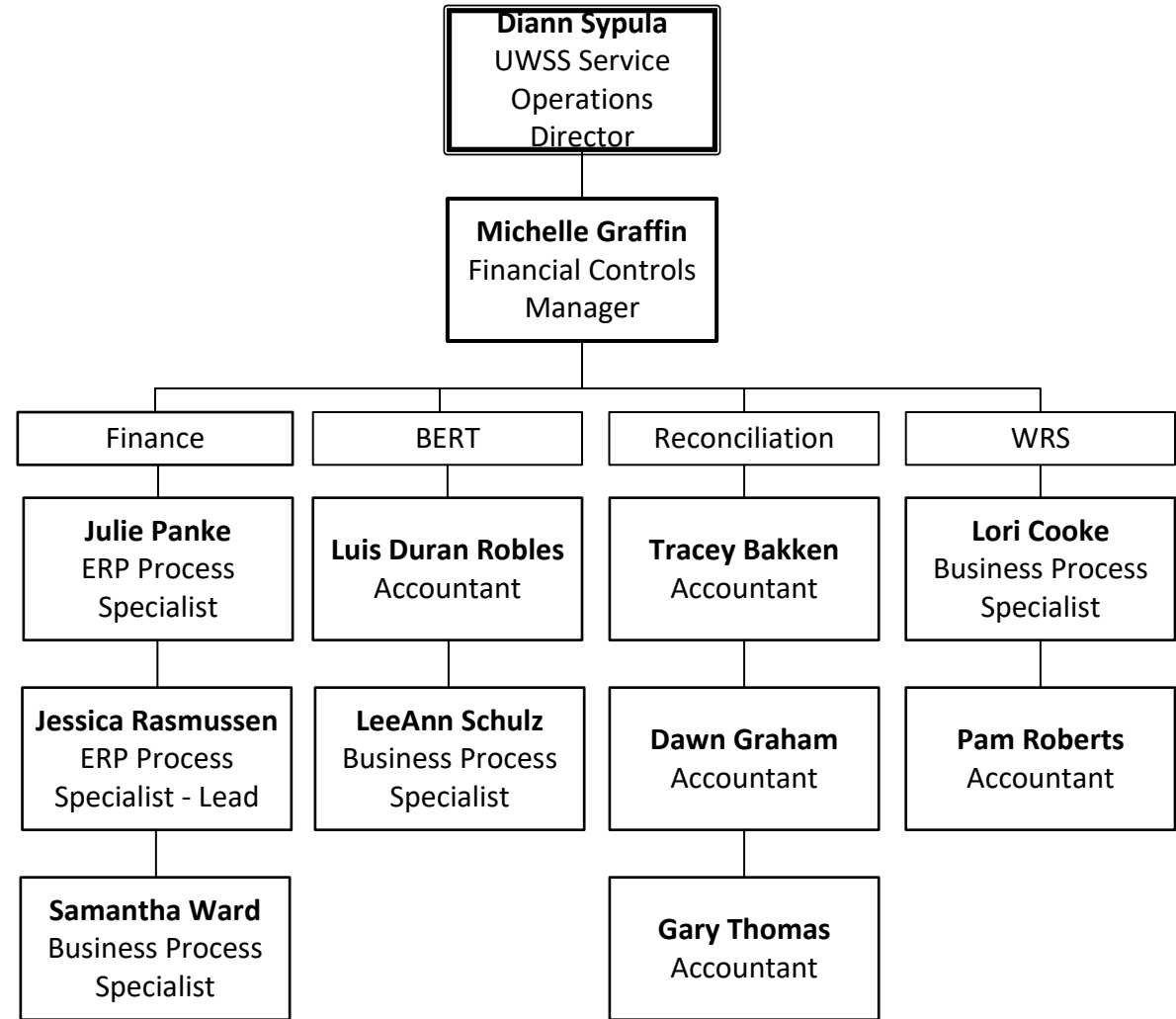
- Support salary encumbrance set up and depletion
- Compensation Administration Tool
 - Support the Compensation Administration Tool and related business processes assisting with the development of employee related expenses.
- Mass uploads
 - Perform mass updates of HR related data changes such as pay plan updates or reporting hierarchy changes.

UW-Shared Services Service Operations

Reconciliation & Financial Controls

Reconciliation & Financial Controls

- Prints and distributes vendor checks created by employees' voluntary deductions.
- Calculates and organizes benefits and WRS contributions to make sure everything is consistent and paid for.
 - Main interaction point with EFT relating to WRS
 - Handles periodic data transfers and reporting to ETF
- Reconciles benefit premium payments to vendors compared to HRS activity
 - Initiates needed corrections and manages any needed employee collections



UW-Shared Services

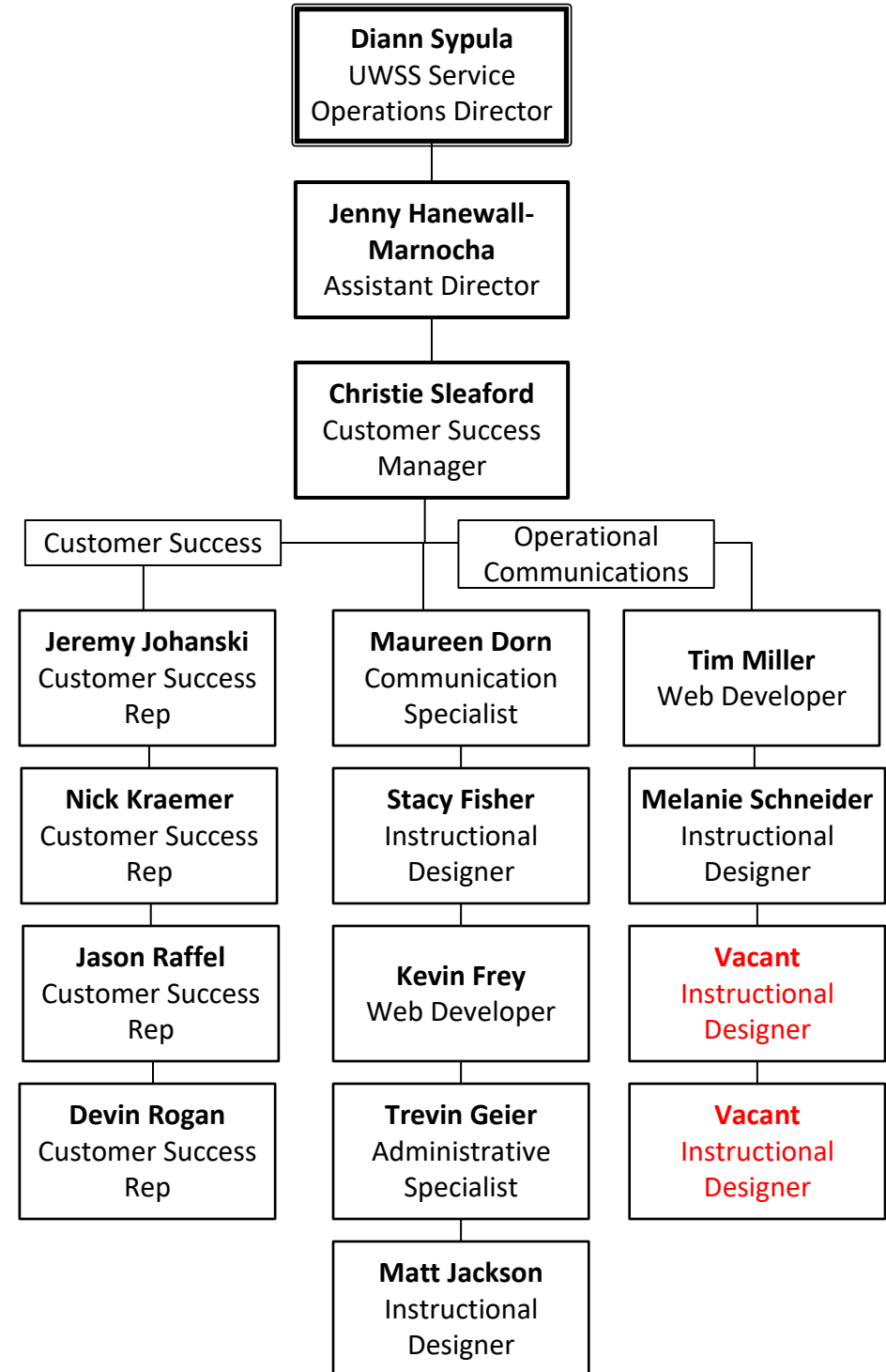
Service Operations

Customer Success & Service Delivery

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Customer Success & Operational Communications

- Frontline Customer Support
 - Basic help on system usage, process flows, through assistance with more complex policy questions and issue resolution
 - Provide online self-service tools for employees and HR/Payroll/Benefit professionals at the institutions including, training videos, tip sheets, knowledge base documents and FAQs
- Customer Communications
 - Facilitate routine sessions to communicate upcoming events, due dates, process changes, etc.
 - Deliver communications to employees and HR/Payroll/Benefit professionals confirming completion of certain transactions, announcing upcoming events, etc.
- Change management for new processes and functionality
 - Support the change management process for major and minor projects resulting in new functionality or new business processes



UW-Shared Services

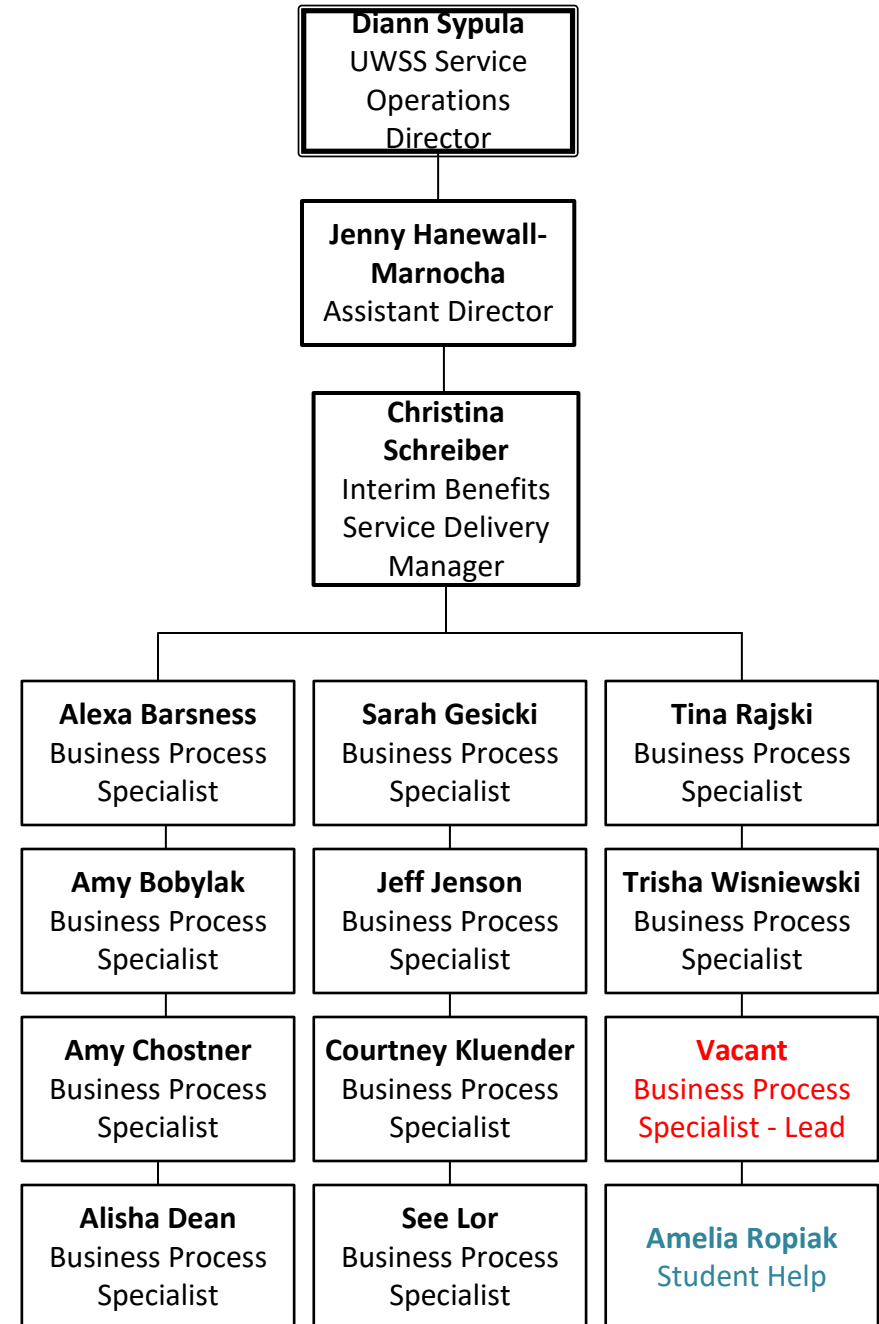
Service Operations

Customer Success & Service Delivery

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Benefits Service Delivery

- Application Entry (excluding Madison and Milwaukee)
 - Process paper benefit applications when required by ETF and/or providers
- Sick Leave Certification to ETF (Employee Trust Fund)
 - Certify sick leave data for retiring employees and submit to ETF for further processing
- New Hire Data Review
 - Validate data for newly hired employees between HRS and ETF's system and make any needed updates to assure consistency
- COBRA
 - COBRA notification and applicable benefit data is sent to all terminating employees in accordance with State and Federal regulations
- Benefits Billing
 - In certain circumstances, employees are billed for their insurance premiums rather than taking payroll deductions. For example, an employee on an unpaid leave of absence
- Job Date Updates for Benefit Eligibility
- Plan Discrepancies
 - Coverage mismatches, plan mismatches, etc.



UW-Shared Services

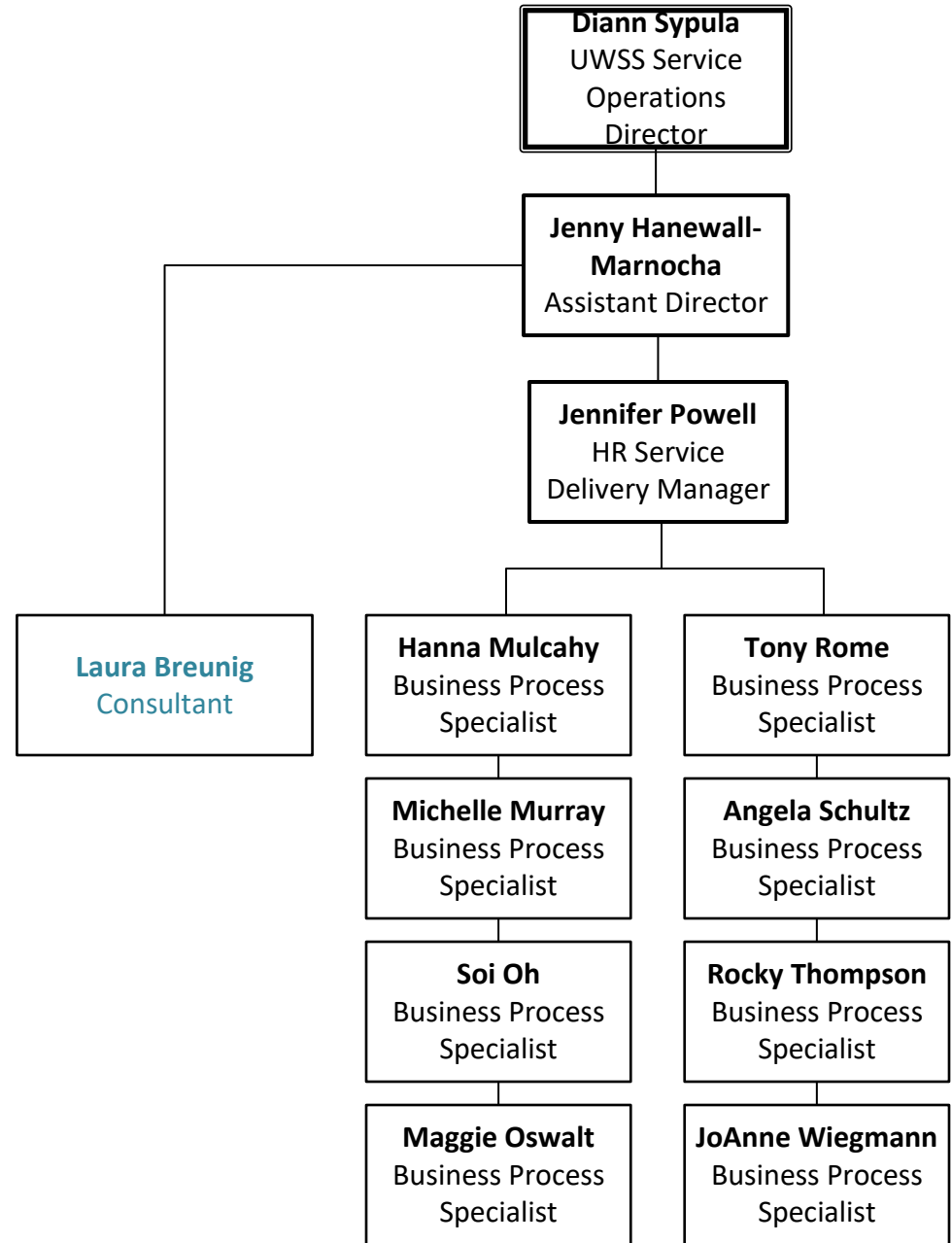
Service Operations

Customer Success & Service Delivery

Page 3 of 4

Human Resources Service Delivery

- Campus Support
 - Criminal background check administration (for all but UW-Madison)
 - Sexual harassment reference check administration
 - Mandatory employee training
- Troubleshooting
 - Remote Work & Telecommuting Agreements
 - Performance Management
 - TAM/Finance
- Service Delivery
 - Outside Activity Reporting for all but UW-Madison and UW-Milwaukee
 - SUP Lump Sum processing



UW-Shared Services

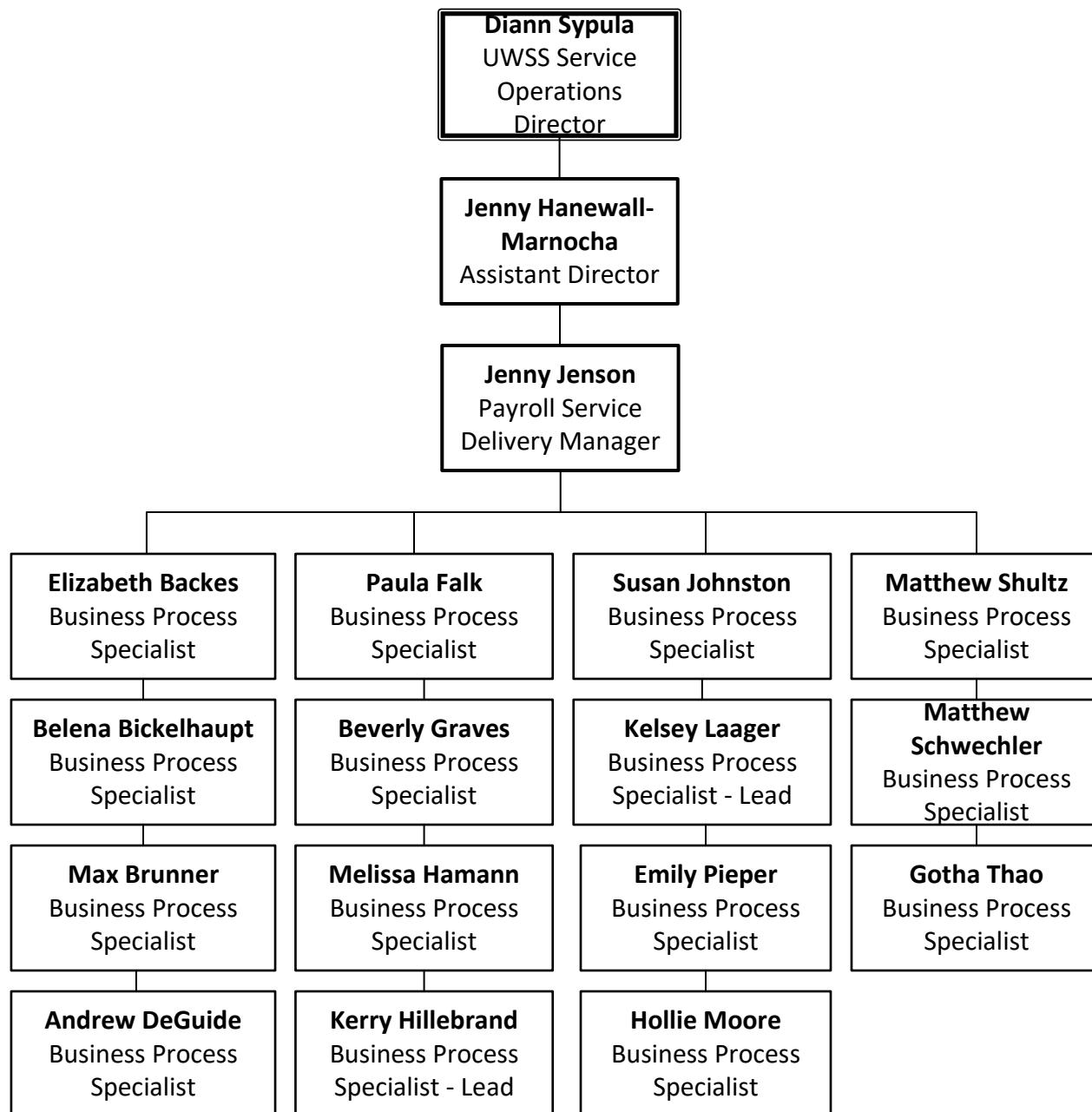
Service Operations

Customer Success & Service Delivery

Page 4 of 4

Payroll Service Delivery

- Time and Absence reports
 - Monitor and correct anomalies in time and absence reports in preparation for the bi-weekly payroll processes
 - Review final timesheets and leave payouts for terminating employees, make any needed adjustments
- Garnishments
 - Initiate and process garnishments per legal requirements
 - Provide employees with periodic communications related to balances and other updates as may be needed
- Payroll Corrections
 - Assist employees and HR professionals at the campuses in reviewing paychecks when concerns arise
 - Facilitate any needed corrections



UW-Shared Services

Service Operations

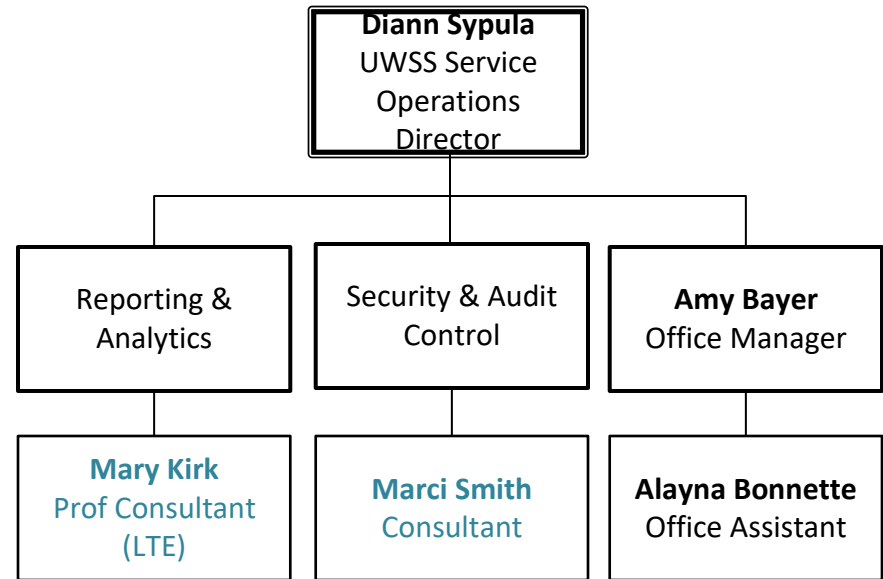
Reporting & Analytics
Security & Audit Support
Office Administration

Reporting & Analytics

- Support OBIEE
 - Build standardized workforce related reports that are used across organization for research and analysis
 - Provide overall support for the tool including maintenance and upgrades, assistance with testing and migration of new reports to production, and access reviews
- Support warehouse for HRS data
 - Support data movement from HRS to EPM ensuring timely delivery of the data
 - Support existing data models as well as generating new models to meet evolving business requirements
 - Review access requests for appropriate usage and control of sensitive and private data
- Ad hoc workforce related data requests
 - Fulfill a wide spectrum of data requests, including freedom of information, legal discovery and data for large UW initiatives

Security & Audit Support

- Works closely with DoIT to ensure security, protect sensitive data, and set clear separation of duties (SOD).
- Security and access management
 - User Access Management: provisioning, deprovisioning and routine attestation
 - Review functionality and business processes assuring solid security and internal controls are in place
 - Coordinate with technical staff on infrastructure security monitoring and updates
 - Collaborate with our Cyber Security team and others as appropriate for incident management



Office Administration

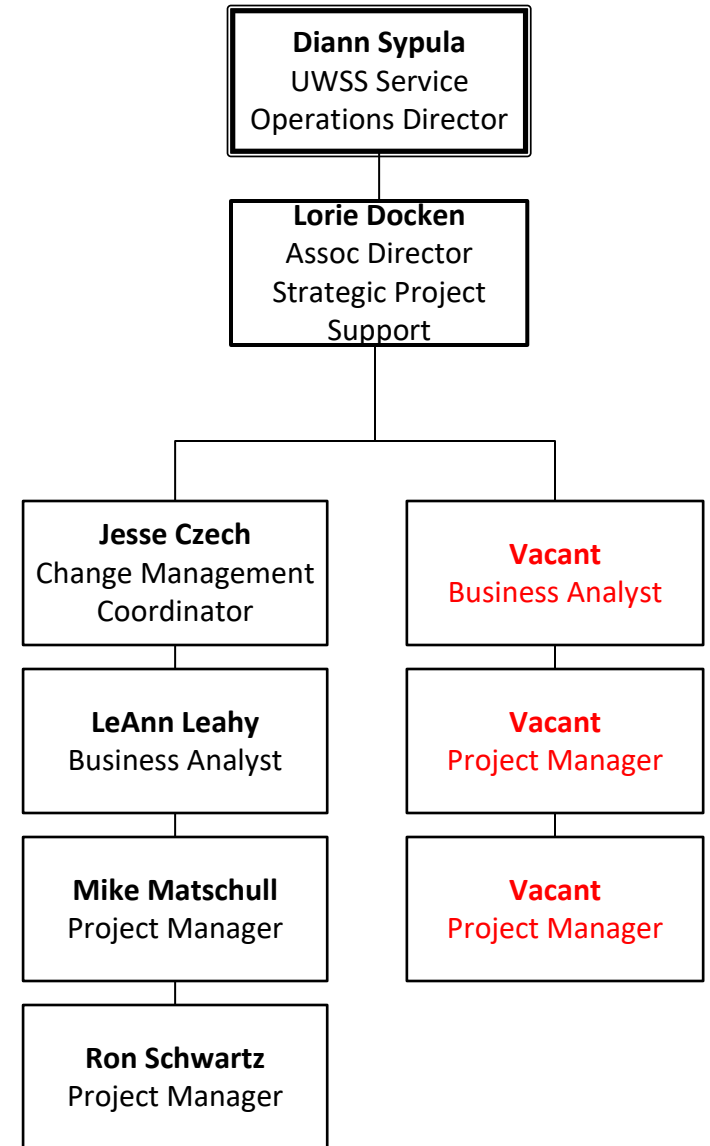
- Responsible for general office administration, purchasing, room reservations, and incoming currency and mail management
- Assist with recruiting, onboarding, and offboarding of staff

UW-Shared Services Service Operations

Strategic Project Support & Mgmt

Project Management Office

Works with experts from business operations teams to implement policies or changes into the HRS. Keeps track of deadlines and projects for smooth production of new features or changes (e.g., HRS 9.2 Upgrade).



UW-Shared Services

Service Operations

ATP Project Reassignment

Temporary
Reassignment to
ATP Project

Andrew Bade

Christine Greger

Colleen Kerl

Maria Lindquist

Joanna Bauer

Zack Haak

Rhonda Langetieg

Kristy Rogers

Bindi Desai

Tina Howell

Ryan Leavitt

Sheila Whitley

Tami Eberle

Kate Ingram

Nima Lendey

Paul Willing

Ramesh Godishala