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UNIVERSITY OF WISCONSIN  
SERVICE CENTER

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### 3.1 CREATE PERSON IDENTIFICATION

A person must be added before an appointment can be established. This transaction creates a skeletal person record for new employees. This allows appointments and payroll records to be created before W4 forms have been submitted and entered.

#### Enter PSID (space) SSN

*** NEW PERSON ID ***	00084142	1	PSID
NAME:	_____ 2 _____	(LAST, FIRST MI)	
SSN	___ 3 ___		
SEX	__ 4	BIRTHDATE	__ 5 ___
SENIORITY DATE	__ 6 ___	(Classified Perm and Project)	
NEXT	__ 7	TP EXIT	_____
ENTER PERSON INFORMATION ABOVE			
1)HELP 2)ERR 3)STOP 5)APPT 6)SHAP			11)EXIT

#### PSID cannot be used for:

1. Assigning 980 substitute numbers (use W4EN)
2. Name changes (use NMCH)
3. SSN changes (Send documentation of correct SSN to UWSC.)
4. Changing a 980 number to a SSN (Send documentation of correct SSN to UWSC.)

ITEM	TITLE	DESCRIPTION
1	<b>NEW PERSON ID</b>	Confirmation screen will appear with employee's assigned Person/Employee number.
2	<b>NAME</b>	Enter Employee's Name in the format LASTNAME, FIRSTNAME MIDDLE INITIAL. <b>There is a limit of thirty characters.</b> Enter name as it appears on the social security card. Do not use any punctuation other than a comma after the last name. Do not enter space between MC and D in names such as MCDONALD. Do not use apostrophes in names. Do not abbreviate names, e. g. WM for WILLIAM. Include JR after the last name, e.g. JONES JR, JOHN D Hyphenated names should be entered as: SMITH-ADAMS, DEBORAH A
3	<b>SSN</b>	Re-enter Social Security Number.
4	<b>SEX</b>	Enter gender. M = Male F = Female U = Unknown
5	<b>BIRTHDATE</b>	Enter as Month, Day, and 4 digit year.
6	<b>SENIORITY DATE</b>	Optional Field. The adjusted date of Classified Civil Service Employment for Classified Permanent employees. This field is also used for Classified Project Employees in order to calculate leave allocations.
	<b>ENTER</b>	Press Enter to Add. If the original social security number entered does NOT match the social security number entered in Field 3, a blank screen is returned with the message. "LAST SSN DOES NOT MATCH PREVIOUS. PLEASE RE-ENTER SSN TO CONFIRM".
7	<b>NEXT</b>	PF 5 to go to APPT to Add Appointment. Or enter next SSN to create next Employee's Person ID.

### 3.2 AFFIRMATIVE ACTION DATA ADD

This transaction is used to enter state disability and state veteran data.

Enter AASD then press enter

```

Please enter SSN or Person ID
IPAASM01                                PERSON ID                                04/27/07

STATE DISABILITY DATA: 2 _ DISABILITY (N=NONE, D=DISABLED, S=SEVERELY DISABLED)
-----
                                3          STATE VETERANS DATA
_ NOT A VETERAN                                1 NEXT SSN OR PERSON ID _____
_ VETERAN
_ SPOUSE 70% DISABLED VET
_ UNREMARRIED SPOUSE
_ DISABLED AT _____ %

                                4          ACTIVE SERVICE
_ 01 WORLD WAR II                                _ 02 KOREAN CONFLICT                                _ 03 VIETNAM WAR 8/64-7/75
_ 04 61 BERLIN CRISIS                            _ 17 DESERT SHIELD/STORM                        _ 20 2 YEAR ACTIVE DUTY

                                5          CAMPAIGNS
_ 05 BERLIN                                _ 12 QUEMOY AND MATSU
_ 06 CONGO                                    _ 13 TAIWAN STRAITS
_ 07 CUBA                                      _ 14 VIETNAM 7/58-8/64
_ 08 GRENADA                                  _ 15 MIDDLE EAST CRISIS
_ 09 LAOS                                      _ 16 OPERATION JUST CAUSE, PANAMA
_ 10 LEBANON 1958                              _ 18 OPERATION RESTORE HOPE, SOMALIA
_ 11 LEBANON 1982-1984                        _ 19 BOSNIA
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
                                                6          EXIT
    
```

ITEM	TITLE	DESCRIPTION
1	NEXT SSN OR PERSON ID	Enter SSN or PID
2	STATE DISABILITY DATA	Enter: N if None D if Disabled S if Severely disabled
3	STATE VETERANS DATA	Place an X in appropriate field. Indicate % of disability if disabled. To delete an X in this section, use the spacebar.
4	ACTIVE SERVICE	Enter an X in appropriate field. To delete an X in this section, type D over the X.
5	CAMPAIGNS	Enter an X in appropriate field. To delete an X in this section, type D over the X.
	ENTER	Press enter when entry is complete.
1	NEXT SSN OR PERSON ID	Enter SSN of next employee veteran form and press enter.
6	FUNCTION KEYS	Press pf 11 to exit the transaction.





### 3.3 WITHHOLDING ALLOWANCE ADD OR CHANGE (cont.)

Enter W4EN (space) SSN or PID

<p><b>6</b></p>	<p><b>VISA</b></p>	<p>Visa cannot be entered or changed through this transaction. Go to separate VISA transaction. Below is the definition of the characters displayed.            Blank = No Visa information            1 = F1 or J1 Visa            2 = Temporary Visa other than a F1 or J1            3= Immigrant with Permanent Residency</p>
<p><b>7</b></p>	<p><b>EMPLOYED COUNTY</b></p>	<p>Enter County Code from county code listing. Field is used for State Industry/Labor report.</p>
<p><b>8</b></p>	<p><b>HEALTH COUNTY</b></p>	<p>Health county is obtained from health insurance application. Refer to County Code listing and enter appropriate code. Enter residence county in this field when employee has standard or PPO plans. Entry is required in order to update premiums each calendar year.</p>
<p><b>9</b></p>	<p><b>FEDERAL TAX STATUS</b></p>	<p>Enter from the Marital Status box on W-4:            a) S if Single is checked.            b) M if Married is checked.            c) S if Married, but withholding at higher single rate.            Enter S if none checked or if there is a problem with the W-4 completion and it is considered invalid. (An invalid W-4 would be missing a SSN, name, address, number of exemptions, marital status or signature)</p>
<p><b>10</b></p>	<p><b>NUMBER OF EXEMPTIONS</b></p>	<p><b>Enter the number of Federal Allowances from the W-4 form:</b>            a) If blank, enter 00.            b) Exemptions need to be entered. Use PYDC to determine number of exemptions to use. Employee can elect Additional Tax only, in which case enter 99 exemptions and the additional amount (see item 11).            c) If 99 exemptions are used, the wages will be reported to the IRS, but no withholding will take except for the additional amount listed.            d) If using the IRS W-4 form and exempt is written in the Exempt for Federal Tax box, or using the UW W-4 form and the exempt for Federal tax is marked yes, enter T and the last digit of the current year (i.e. T4 is exempt for 2004). Use new exempt year after the last paid calc of the calendar year. The T-code reports wages to the IRS, but withholding is not taken. A program will run that will automatically change all old year exempts to Single with 0 exemptions for any calc paid after 2/15 if no new exempt year is entered. See Annual Domestic Tax Status Changes at <a href="http://www.bussvc.wisc.edu/ecbs/dtx-annual-tax-status-changes-UW1337.pdf">http://www.bussvc.wisc.edu/ecbs/dtx-annual-tax-status-changes-UW1337.pdf</a> for more information. See back of UW W4 for additional info on who can't claim exempt.            e) Code NT will not report any wages to the IRS, or take any withholding. This code is used infrequently, and should only be used for Non Resident Aliens who are working outside of the United States. If there are questions, email the payroll inbox at <a href="mailto:payroll@ohr.wisc.edu">payroll@ohr.wisc.edu</a></p>

### 3.3 WITHHOLDING ALLOWANCE ADD OR CHANGE (cont.)

#### Enter W4EN (space) SSN or PID

```

SSN: xxx xx xxxx                PERSON ID: xxxxxxxxx
NAME: BROWN, ROSEY R            EMP NUMBER: 300618
DOB(MM DD CCYY): 08 14 1937    SEX:          MARITAL:          HERITAGE:          VISA:
WORK AUTH EXP DATE:
EMPLOYED COUNTY: 13 DANE        HEALTH COUNTY:

FEDERAL TAX
STATUS: M    NUMBER OF EXEMPTIONS: 02    ADDITIONAL $:11 EIC: 12 EIC FUT:
STATE TAX
STATUS: M 13NUMBER OF EXEMPTIONS: 04 14 ADDITIONAL $:15
HOME PHONE: (    ) -    ..16
HOME ADDRESS
STREET:          111 Main Street
CITY, STATE:    Madison, WI
ADDITIONAL:
ZIP:            53714                RELEASE ADDRESS: Y

DATE OF W4(MM DD YY): 12 09 80    STATUS: P
NEXT KEY:
NON-EMP WITHHOLD:  FED(Y/N):    STATE(Y/N):                EDIT    N-EMP    ....
NE EXEMPT EXPIRES(MM DD YY):    ALTNEXT:                CPAD    ....    ....
                                =-1    =1    =+0
                                /HOLD  /EXIT  ....
    
```

ITEM	TITLE	DESCRIPTION
11	ADDITIONAL	Enter dollar amount requested from the Additional Federal Tax box on the W-4. This amount will take on every payroll calculation. To remove an amount, enter an * in the first space in the field and delete all remaining numbers, or enter 0.00 and delete the remaining numbers. This field has a limit of \$3549.00.
12	EIC	Enter S, M, or X. Do not use EIC FUT field. S = Single or Head of Household M = Married with both spouses filing a certificate or X = Married without spouse filing a certificate. To remove EIC, enter an *. Remove after the last paid calc of the calendar year & before first paid calc of new year for employee's who do not renew their W-5. See Annual Domestic Tax Status Changes at <a href="http://www.bussvc.wisc.edu/ecbs/dtx-annual-tax-status-changes-UW1337.pdf">http://www.bussvc.wisc.edu/ecbs/dtx-annual-tax-status-changes-UW1337.pdf</a> for more information.
13	STATE TAX STATUS	Enter from the Marital Status box on W-4: a) S if Single is checked. b) M if Married is checked. c) S if Married, but withholding at higher single rate. Enter S if none checked or if there is a problem with the W-4 completion and it is considered invalid. (An invalid W-4 would be missing a SSN, name, address, number of exemptions, marital status, or signature)



### 3.3 WITHHOLDING ALLOWANCE ADD OR CHANGE (cont.)

ITEM	TITLE	DESCRIPTION
14	NUMBER OF EXEMPTIONS	<p><b>Enter the number of Wisconsin Allowances from the W-4 form:</b></p> <ul style="list-style-type: none"> <li>a) If blank enter 00.</li> <li>b) Up to 98 exemptions can be claimed. The UWSC will report anyone who claims more than 10 exemptions to WI DOR.</li> <li>c) Enter 99 for exemptions when filing a W-200, WT-4A, or IRS 673. Wages will be reported to WI DOR, but no withholding will be taken. All forms must be completed annually.</li> <li>d) If using the WI WT-4 form and exempt is written in the Exempt for State Tax box, or using the UW W-4 form and the exempt for State tax is marked yes, enter T and the last digit of the current year (i.e. T4 is exempt for 2004). If a person claims exempt and makes more than \$250 per week the UWSC will submit the W-4 information to WI DOR. Use new exempt year after last paid calc of calendar year. A program will run that will automatically change all old year exempts to Single with 0 exemptions for any calc paid after 2/15 if no new exempt year was entered.</li> <li>e) If employee indicated they are a resident of Illinois, Michigan, Indiana, Kentucky, enter the appropriate code of IL, MI, IN, or KY. These state codes will indicate that no wage will be reported and no withholding will be taken.</li> <li>f) If employee indicated they are a legal resident of another state and their work is performed outside of Wisconsin, enter NT. Exception for California, if an employee lives and works in California, then enter a CA and a miscellaneous deduction code 423 with the appropriate flat dollar amount of withholding per paycheck.</li> <li>g) See Annual Domestic Tax Status Changes at <a href="http://www.bussvc.wisc.edu/ecbs/dtx-annual-tax-status-changes-UW1337.pdf">http://www.bussvc.wisc.edu/ecbs/dtx-annual-tax-status-changes-UW1337.pdf</a> for more information.</li> <li>h) If questions, please contact the payroll inbox at <a href="mailto:payroll@ohr.wisc.edu">payroll@ohr.wisc.edu</a></li> </ul>

### 3.3 WITHHOLDING ALLOWANCE ADD OR CHANGE (cont.)

ITEM	TITLE	DESCRIPTION
15	ADDITIONAL	Enter additional amount requested on the WT-4, WT-4A, or from the UW W-4. This amount will take on every payroll calculation. To remove an amount, enter an * in the first space in the field and delete all remaining numbers, or enter 0.00 and delete the remaining numbers. This field has a limit of \$3549.00.
16	HOME PHONE	Enter phone number. To delete, enter * in the first space of the area code, and delete the rest of the phone number.

**NOTE:** See <http://www.bussvc.wisc.edu/ecbs/dtx-annual-tax-status-changes-UW1337.pdf> for Annual Tax Withholding Events for instructions on filing exempt or filing a WT-4A, W-5 or W-200.

### 3.4 EMPLOYEE HOME ADDRESS ADD OR CHANGE

#### Enter W4EN (space) SSN or PID

```
SSN: xxx xx xxxx                PERSON ID: xxxxxxxxx
NAME: BROWN, ROSEY R            EMP NUMBER: 300618
DOB(MM DD CCYY): 08 14 1937    SEX:      MARITAL:      HERITAGE:      VISA:
WORK AUTH EXP DATE:
EMPLOYED COUNTY: 13 DANE        HEALTH COUNTY:
FEDERAL TAX
STATUS: M    NUMBER OF EXEMPTIONS: 02  ADDITIONAL $:    EIC:    EIC FUT:
STATE TAX
STATUS: M    NUMBER OF EXEMPTIONS: 04  ADDITIONAL $:
HOME PHONE: (      ) -
HOME ADDRESS
STREET:      111 Main Street    17
CITY, STATE: Madison, WI
ADDITIONAL:
ZIP:         53714              RELEASE ADDRESS: Y 18

DATE OF W4(MM DD YY): 12 09 80 19    STATUS: P
NEXT KEY:20
NON-EMP WITHHOLD:  FED(Y/N):    STATE(Y/N):                EDIT    N-EMP    ....
NE EXEMPT EXPIRES(MM DD YY):      ALTNEXT:                CPAD    ....    ....
                                     =-1    =1    =+0
                                     /HOLD  /EXIT  ....
```

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### 3.4 EMPLOYEE HOME ADDRESS ADD OR CHANGE (cont.)

ITEM	TITLE	DESCRIPTION
<b>17</b>	<b>HOME ADDRESS</b>	Enter Home Address in the format as required by the Post Office:
<b>Examples:</b>	111Main St Madison, WI 53714	<b>Do not use any punctuation other than comma after City.</b>
Regular Address		On the street line enter the street address as provided. <b>Field is 30 characters long.</b> Enter city (comma) state on City, State line. Use standard state abbreviation. <b>Field is 30 characters long.</b> Enter a valid U.S. zip code in the zip code field.
Apartment	11 Main St Apt 15 Madison, WI 53714 -----Or----- Apt 15 11 Main St Madison, WI 53714	The apartment should follow the street address. You can list the apartment on the street line, the address on the city, state line, and the city, state on the additional line. Do not use # sign for apartments, units, or lots. Use the # sign in place of a box number only (this does not include PO Box numbers, see examples).
Box Numbers	3400 N Maryland Ave # 2207 Milwaukee, WI 53211	
Dorm/Hall	Smith Hall Room 212 25 Park St Madison, WI 53714	Dorm rooms or halls should be entered on street line with street address on City, State line. Enter city, state on the additional line.
PO Box	PO Box 15 11 Main St Madison, WI 53714	If providing PO Box and street address, enter PO on street line with the street address on the City, State line. Enter city, state on the additional line.
Care Of (C/O)	C/O John Smith 111 Main St Madison, WI 53714	If c/o information is needed, enter c/o (not %) in street address field. Enter street address on City, State line. Enter city, state on the additional line.
Attention	Attention Johnson & Smith CPA 111 Main St Madison, WI 53714	Foreign country should be alone whenever possible on additional line. <b>Field is 25 characters.</b> Foreign Postal Code must follow city/province on the City, State line.
Foreign	11/1 Putthachat Private Home Putthamonthon Nakronpratom 73170 Thailand	For a foreign address, the street address should go on the street line. On the City, State line include name of foreign city, state/province and postal code, abbreviating city/state as necessary to show as much as possible. On the additional line include the full country name spelled out (i.e. Peoples Rep of China). In some cases you may need to add more than the country on the additional line. Leave the zip code field blank.
Foreign (Preferred format)	111 Putthachat Mueang Nonthaburi 11000 Thailand	To delete the remainder of any information on a line that was previously entered, use the space bar, delete key or Erase End of Field key. To delete an entire line of information, type * in the first field and delete the remaining characters or type * in the first field and press Erase End of Field key.
		Helpful tools for proper address formats: <a href="http://www.usps.com">www.usps.com</a> , or for Canadian addresses <a href="http://www.canadapost.com">www.canadapost.com</a> .

### 3.4 EMPLOYEE HOME ADDRESS ADD OR CHANGE (cont.)

ITEM	TITLE	DESCRIPTION
18	RELEASE ADDRESS	Y is automatically generated and phone and address will show on CNAM and directories. Type over the Y to change to N. If neither box in the Address Release box is checked, enter N.
19	DATE OF W4	Use the date of entry. Cannot enter future date. When making any change other than tax status on this screen, i.e. address or health county change, type over the W4 date using the same date that has already been entered. Do not change this field unless a revised tax form is submitted. If you have an incomplete/invalid W-4 use the "dummy" date of 01/01/50.
	ENTER	Press enter or go to next.
20	NEXT	Enter next social security number or PID.
21	FUNCTION KEYS	Press pf 4 to go to CPAD to enter campus address. Press pf 11 to exit the transaction.

#### Home Address Error Report

The Internal Revenue Service and the Wisconsin Department of Revenue require us to report a home address for everyone that gets and annual tax form. The Payroll Service Center also depends on an accurate home address for the mailing of the tax forms. All home address errors should be fixed as soon as possible.

A report will be run monthly after the last "paid month" calculation. It will be distributed to each campus's Cypress "In Box." The program is looking for anyone who should receive a tax form for the current calendar year and runs the person's home address through a program called First Logic. First Logic will compare the address that is listed in the payroll system to the U.S. Post Office address requirements and an error report is generated. The report will list any found home address errors and will include the employee's name, Person ID, a status/error code (see below), the old address (what is in the payroll system) and a new address (what First Logic thinks it should be, if a new address could be determined).

There are two types of status/error codes: ones that start with an "E" and ones that start with an "S." The "S" code errors are the easiest to correct in that they can be fixed directly from the report (First Logic gives you the correct address in the "new address" column). The "E" codes are more difficult in that the address in the "old address" column and the "new address" column are the same. This is because First Logic, for some reason, could not determine what the correct address should be. You may have to contact employees to verify their addresses to be able to correct "E" code errors. Use the W4EN transaction to change the old/wrong address to the new/correct address as specified on the report or in your verification with the employee.

We do not have all the First Logic pieces, such as the one that will correct foreign addresses or the one that converts rural routes to fire lane street addresses. The effect is that these types of addresses will always come up as an error. However, we have stripped E501 for foreign addresses from the reports (so that the Payroll Service Center will just deal with them), but if a foreign address does show up under a different status/error code, just make sure it is in the correct format as specified in the examples on page PER-12.

### 3.4 EMPLOYEE HOME ADDRESS ADD OR CHANGE

Two things that First Logic does not like, but can be in 3270:

1. First Logic will error out any address with both a Post Office box and a street address and will drop the PO Box line in the "new address" column. However, you should leave the PO Box line in and make it the first line of the address ("Street Address" line in W4EN). The street address should go on the second line of the address ("City, State" line in W4EN), and the city and state should be the last line of the address ("Additional" line in W4EN). Refer to the examples of this kind of address on page PER-12. This error message will continue to show up every month.
2. First Logic also does not like the word "box," if it is in reference to a dorm room. In the "new address" column, the correction for "box" will be a # sign. In replacing the word "box" with #, be careful to leave a space before and after the # sign. You can also choose to not correct "box" with the # sign, but the error message will continue to show up every month.

For more information about the Post Office's addressing standards (formatting, abbreviations, etc.), please refer to their website at: <http://pe.usps.gov/text/pub28/welcome.htm>

A listing of the most common status codes are listed below, however there is a possibility that you may see others and if you have any questions, please email the Service Center at [payroll@ohr.wisc.edu](mailto:payroll@ohr.wisc.edu).

#### Common Status/Error Codes

E101	Last line is bad or missing
E212	No city and bad ZIP
E213	Bad City and no ZIP
E214	Bad City and bad ZIP
E216	Bad ZIP, can't determine which city match to select
E302	No primary address line parsed
E412	Street name not found in directory
E413	Possible street name matches too close to choose
E420	Primary range is missing
E421	Primary range is invalid for street/route/building
E422	Pre-directional needed, input is wrong or missing
E423	Suffix needed, input is wrong or missing
E425	Suffix & directional needed, input wrong or missing
E427	Post-directional needed, input is wrong or missing
E428	Bad ZIP, can't select an address match
E429	Bad city, can't select an address match
E430	Possible address line matches too close to choose one
E431	Urbanization needed, input is wrong or missing
E439	Exact match in EWS directory
E500	Other Error
E501	Foreign
E502	Input record entirely blank
E503	ZIP not in area covered by partial ZIP+4 Directory
E504	Overlapping ranges in ZIP+4 directory
E505	Matched to undeliverable default record
E600	Marked by USPS as unsuitable for delivery of mail
E601	Primary number does not DPV confirm, ZIP+4 removed
SA0000	Address Correction assigned a different city and ZIP+4 (e.g. ST should be SAINT)
S80100	Address Correction assigned a different unit designator (e.g. BOX should be #)
S81000	Address Correction assigned a different suffix (e.g. ST should be AVE)
S82000	Address Correction assigned a different primary name (e.g. the address should be preceded by a direction such as N or S)
S84000	Address Correction assigned a different post-directional (e.g. the address should be followed by a direction such as N or S)

### **3.4 EMPLOYEE HOME ADDRESS ADD OR CHANGE (cont.)**

#### **Common Status/Error Codes (cont.)**

- S86000 Address Correction assigned a different pre-directional and post-directional (e.g. 114 N 21<sup>ST</sup> ST should be 114 21<sup>ST</sup> ST N)
- S88000 Address Correction assigned a different primary name (e.g. CTY RD should be COUNTY ROAD or HWY should be HIGHWAY)
- S90000 Address Correction assigned a different ZIP and ZIP +4 (e.g. 97330 should be 97333)

#### **Campus Address Transaction**

##### **Purpose:**

A campus work address and email address are extremely important for each employee because the Service Center may mail the following informational pieces to employees at this address. Some of these items are:

- Classified and Unclassified Earnings Statements
- Unclassified Leave Statements
- Health Insurance Dual Choice materials
- Annual Employee Reimbursement Account enrollment materials
- Annual Insurance Open Enrollment materials, if any
- Annual University Staff Benefits Statement
- Annual WRS Statement of Benefits

In addition to mailing the above materials to the campus address, this information appears in the online UW Directory, and is used by the Campus Directory Assistance Office.

It should be noted that not only does the payroll and benefits office use the campus addresses, others on campus also extract this information for various mailings.

### 3.5 EMPLOYEE CAMPUS ADDRESS ADD OR CHANGE

#### Enter CPAD (space) SSN or PID

```

SSN#: xxx xx xxxx      NAME: SMITH, JOHN M

1 BUILDING #: 1078      BUILDING NAME: PARK ST N 21      ROOM #: 5101      2

3 UDDS: A 02 2070      DEPARTMENT NAME: HUMAN RESOURCES      4 VERIFY UDDS:

5 OFFICE PHONE #1: ( 608 ) 262 - 0000      OFFICE PHONE #2: (      )      -

6 E-MAIL ADDRESS PART 1: JSMITH@
  E-MAIL ADDRESS PART 2: MAILSRVR.BUSSVC.WISC.EDU

7 MTN DATE (MM-DD-YY) : 08 08 06

8 RELEASE HOME ADDRESS: N

9NEXT SSN#:

MAIL SWITCH: J      10      ROOM #2 (IF BOX # ENTERED ABOVE): H4/459      11

VERIFY DATA      12      EDIT      ....      ....
                                W4EN      APPT      ....
                                =-1      =1      =+0
                                /HOLD      /EXIT      ....
    
```

When creating a new campus address, this screen comes up blank if not previously employed at the UW.

ITEM	TITLE	DESCRIPTION
1	<b>BUILDING #</b>	<p>Enter the four digit building code including the leading zeroes and wing letter/number if applicable to which the employee's information should be sent. The codes can be found on the Facilities Planning and Management website at <a href="http://www.fpm.wisc.edu/smoasp/FacilityName.asp">http://www.fpm.wisc.edu/smoasp/FacilityName.asp</a>.</p> <p>If there is no Building Code in an employee's record, the employee's information will be mailed via campus mail to the Payroll and Benefit Coordinator's campus address.</p> <p>Tab to Room #.</p>
2	<b>ROOM #</b>	<p>Enter the room number within the building in which the employee works. If your division/department uses mailboxes, this field may be used to distinguish the employee's mailbox.</p> <p>Tab to UDDS</p>
3	<b>UDDS</b>	<p>If there is information in the UDDS field, this information is being pulled from the payroll record for the employee, OR is information about the employee's past payroll record.</p> <p>Review the UDDS information on the APPR screen and make a decision as to what should appear in this field. You can elect to have the UDDS in this field represent one of the UDDS numbers from which the employee is being paid, or the UDDS to which you want the employee's information sent.</p> <p>Enter the UDDS Tab to the Verify UDDS field</p>



### 3.5 EMPLOYEE CAMPUS ADDRESS ADD OR CHANGE (cont.)

ITEM	TITLE	DESCRIPTION
4	<b>VERIFY UDDS (Required Field)</b>	<p>This field is used to lock in the UDDS that you entered at Step 3 so that upon processing the payroll calculation, the information from the payroll record does NOT overlay what you have entered.</p> <p>This field has two valid values. If the screen comes up with this field blank, it means that there is a "B" in the record. If the record has a "B" in it, the payroll UDDS will overlay whatever is in this field.</p> <p>If the screen comes up with this field filled with "V", it means that the UDDS that was on this record was verified and was not to be changed.</p> <p>Enter the appropriate code: Enter "B" if you want the payroll UDDS to always overlay whatever is in this field.</p> <p>Enter "V" if you want the UDDS that you entered to take precedent over whatever is on the payroll. An example of this would be someone who is working in a specific department (work location), but is not being paid by them, and you want the information delivered to the work location.</p> <p>Note: This field is required for every addition made to the campus address.</p>
5	<b>OFFICE PHONE #1 and #2</b>	<p>Enter the employee's office phone number, including area code.</p> <p>If the employee has another phone number enter the second number in the Office Phone #2 field.</p>
6	<b>EMAIL ADDRESS PART 1 &amp; PART 2</b>	<p>Enter the email address up to and including the @ in Part 1. Note: The @ sign must be the last character on this line. Enter the remainder of the email address in Part 2.</p>
7	<b>MTN DATE (Required Field)</b>	<p>Enter the current date. This field MUST BE entered in mm-dd-yy format or the transaction will not update. Future dates are not accepted.</p>
8	<b>RELEASE HOME ADDRESS</b>	<p>Y or N is displayed (yes or no). Indicates if home address and telephone number can be released to the public upon request. This field can only be added or changed through the transaction W4EN.</p>
9	<b>NEXT SSN or PID</b>	<p>If entering a multiple number of employee's campus addresses, you can simplify the step by entering the next employee's social security number or PID.</p> <p>Note: The verify UDDS and MTN date (required fields) have to be keyed or re-keyed prior to entering the next SSN or PID and hitting enter.</p>
10	<b>MAIL SWITCH</b>	<p>This is obsolete.</p>
11	<b>ROOM #2</b>	<p>If a box # for mail delivery purposes is put in Room # (#2 above) field then enter actual room # here.</p>
	<b>ENTER</b>	<p>Press enter when done.</p>
12	<b>FUNCTION KEYS</b>	<p>Press pf 4 to go to W4EN transaction. Press pf 5 to go to APPT transaction. Press pf 11 to exit the transaction.</p>

### 3.5 EMPLOYEE CAMPUS ADDRESS ADD OR CHANGE (cont.)

A campus address can be changed by either deleting the information in the field by entering an asterisk \* in the first space in the field, and deleting the remaining information, or keying over the information to replace it.

#### Enter CPAD (space) SSN or PID

```

SSN#: xxx xx xxxx          NAME: SMITH, JOHN M

1 BUILDING #: 1078  BUILDING NAME: PARK ST N 21          ROOM #: 5101  2
3 UDDS: A 02 2070 DEPARTMENT NAME: HUMAN RESOURCES      4 VERIFY UDDS:
5 OFFICE PHONE #1: ( 608 ) 262 - 0000  OFFICE PHONE #2: (   )   -
6 E-MAIL ADDRESS PART 1: JSMITH@
  E-MAIL ADDRESS PART 2: MAILSRVR.BUSSVC.WISC.EDU
7 MTN DATE(MM-DD-YY): 08 08 06
8 RELEASE HOME ADDRESS: N

9NEXT SSN#:

MAIL SWITCH: J    10          ROOM #2 (IF BOX # ENTERED ABOVE):  H4/459  11

VERIFY DATA          12          EDIT    ....  ....
                                W4EN  APPT  ....
                                =-1   =1   =+0
                                /HOLD /EXIT  ....
    
```

When deleting/changing a campus address, this screen will come up filled or partially filled.

ITEM	TITLE	DESCRIPTION
1	BUILDING #	<p>Change the Building Code by entering the four digit building code including the leading zeros and wing letter/number if applicable to which the employee's information should be sent. The codes can be found on the Facilities Planning and Management website at:  <a href="http://www.fpm.wisc.edu/smoasp/FacilityName.asp">http://www.fpm.wisc.edu/smoasp/FacilityName.asp</a>                      -----or-----</p> <p>Delete if an employee has left your employment and the new employer does not update the campus address timely but you continue to receive the employee's earning and/or leave statements. Deleting the Building # will delete the Building Name and Address. Type an asterisk * in the first position of the field and delete the remaining characters.</p> <p>The employee's campus mail will then be sent to the employee's new payroll and benefit coordinator.</p> <p>Tab to Room #.</p>

### 3.5 EMPLOYEE CAMPUS ADDRESS ADD OR CHANGE (cont.)

ITEM	TITLE	DESCRIPTION
2	<b>ROOM #</b>	<p>Change the room number by entering the room number within the building in which the employee works.</p> <p>If your division/department uses mailboxes, this field may be used to distinguish the employee's mailbox. -----or-----</p> <p>If deleting the room number and not replacing it, type an asterisk * in the first position of the field and delete the remaining characters.</p> <p>Tab to UDDS</p>
3	<b>UDDS</b>	<p>Change the UDDS by keying over the UDDS that is displayed on the screen. -----or-----</p> <p>Delete the UDDS. This will delete the entire campus address. Type an asterisk * in the first position of the field and delete the remaining characters.</p> <p>Tab to the Verify UDDS field</p>
4	<b>VERIFY UDDS (Required Field)</b>	<p>This field is used to lock in the UDDS that you entered at Step 3 so that upon processing the payroll calculation, the information from the payroll record does NOT overlay what you have entered.</p> <p>This field has two valid values.</p> <p>If the screen comes up with this field blank, it means that there is a "B" in the record. If the record has a "B" in it, the payroll UDDS will overlay whatever is in this field.</p> <p>If the screen comes up with this field filled with "V", it means that the UDDS that was on this record was verified and was not to be changed.</p> <p>Enter the appropriate code: Enter "B" if you want the payroll UDDS to always overlay whatever is in this field.</p> <p>Enter "V" if you want the UDDS that you entered to take precedent over whatever is on the payroll. An example of this would be someone who is working in a specific department (work location), but is not being paid by them, and you want the information delivered to the work location.</p> <p>Note: This field is required for every change/delete made to the campus address.</p> <p>Tab to Office Phone.</p>

### 3.5 EMPLOYEE CAMPUS ADDRESS ADD OR CHANGE (cont.)

ITEM	TITLE	DESCRIPTION
5	<b>OFFICE PHONE #1 and #2</b>	<p>Change the office phone #1 and #2 by keying over the information that displays in these fields.</p> <p>If the employee has another phone number enter the second number in the Office Phone #2 field. -----or-----</p> <p>Delete the office phone #1 and #2. To delete this entry, enter * in the first space of the area code and delete the remaining numbers.</p> <p>Tab to E-mail</p>
6	<b>EMAIL ADDRESS PART 1 &amp; PART 2</b>	<p>Change the email address up to and including the @ in Part 1. Note: The @ sign must be the last character on this line.</p> <p>Enter the remainder of the email address in Part 2. -----or-----</p> <p>Delete. To delete this entry, enter * in the first space in the field, and delete the remaining numbers.</p> <p>Tab to MTN (maintenance) date.</p>
7	<b>MTN DATE (Required Field)</b>	<p>Enter the current date in mm-dd-yy format.</p> <p>This field can not be left blank, and MUST BE filled in or the transaction will not update. Future dates are not accepted.</p>
8	<b>RELEASE HOME ADDRESS</b>	<p>This field will display a "Y", or an "N" meaning DO NOT RELEASE THE HOME ADDRESS. To change the employee needs to fill out a change of address, or file a new W-4.</p>
9	<b>NEXT SSN or PID</b>	<p>If entering a multiple number of employee's campus addresses, you can simplify the step by entering the next employee's social security number or PID here.</p> <p>Note: The verify UDDS and MTN date (required fields) have to be keyed or re-keyed prior to entering the next SSN or PID and hitting enter.</p>
10	<b>MAIL SWITCH</b>	<p>This is Obsolete.</p>
11	<b>ROOM #2</b>	<p>If a box # for mail delivery purposes is put in Room # (#2 above) field then the actual room # here can be entered here.</p> <p>Change the room number. -----or-----</p> <p>Delete the room number. To delete this entry, enter * in the first space in the field, and delete the remaining numbers.</p>
	<b>ENTER</b>	<p>Press enter when done.</p>
12	<b>FUNCTION KEYS</b>	<p>Press pf 4 to go to W4EN transaction. Press pf 5 to go to APPT transaction. Press pf 11 to exit the transaction.</p>

### 3.6 SENIORITY DATE ADD OR CHANGE

This transaction is used to enter or change employee's seniority dates and/or bargaining unit.

#### Enter ADSV (space) SSN or PID

```

SSN:   xxx xx xxxx           PERSON ID:  xxxxxxxxx

SMITH, JANE

1      12 16 1985  SENIORITY OR ADJ. CONT. SERVICE DATE (MM DD CCYY)

2      11          BARGAINING UNIT

3      NEXT SOC SEC NUMBER

                                           EDIT   ....   ....
4      ....   ....   ....
      =-1     =1     =+0
      /HOLD  /EXIT  ....
    
```

ITEM	TITLE	DESCRIPTION
1	<b>SENIORITY OR ADJ CONT SERVICE DATE</b>	Enter seniority date for new employee or adjust the seniority date as needed. Use the calculator located at <a href="http://www.bussvc.wisc.edu/ecbs/uw1058-sen-info.html">http://www.bussvc.wisc.edu/ecbs/uw1058-sen-info.html</a> to help you figure out the adjusted seniority date if needed.
2	<b>BARGAINING UNIT</b>	Enter Bargaining Unit Number. If employee is in two bargaining units, enter the bargaining unit whose rules you want to govern. Employees in BU 18 should be entered as 19, and employees in BU 96 or 97 should be entered as 98.
	<b>ENTER</b>	Press enter when entry is complete.
3	<b>NEXT SSN or PID</b>	Enter SSN or PID of next employee to continue entering seniority dates.
4	<b>FUNCTION KEYS</b>	Or press pf 11 to exit the transaction.

### 3.7 PAYMENT DISBURSEMENT ADD OR CHANGE

This transaction is used to enter bank account information, and to view the payment history for employees.

Enter PAYU. Below is the screen that will appear.

```

+-----+
|                                     |
|           Welcome to the Payment Disbursement System           |
|                                     |
|   << Does your terminal support special attributes (Y/N)? _ >>   |
|                                     |
|   If you enter 'Y' and then get 'stuck' on this screen, your terminal |
|   does not support special attributes. Press PF3 twice to exit and |
|   try the transaction again, entering 'N' instead. Use '.' to exit. |
|                                     |
+-----+
  
```

Type a "Y" and hit enter.

```

ACPAYP1                PAYU: Payment Disbursement Update                ACPAYM1
03/19/07                Main Menu                4:13 PM

      Select                Find By                Example
      -----                -----                -----

      1      Direct Deposit Authorization                SSN                123456789
      2      Direct Deposit Authorization                Name                SEQUOIA, J
      3      Direct Deposit Authorization                Person ID                12345678

      4      Payment Audit Trail                SSN                123456789
      5      Payment Audit Trail                Name                SEQUOIA, J
      6      Payment Audit Trail                Person ID                12345678

1 Select: _      Find by: _____

Direct Command: _____
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
      HELP                QUIT
Type a Select code and ENTER.
  
```

ITEM	TITLE	DESCRIPTION
1	SELECT/FIND BY	Select option you wish to view from selection provided. To view or start a Direct Payment Authorization, select option 1, 2, or 3 and enter SSN, Name or Person ID in the find by field. To view a payment audit trail to view each payment, select option 4, 5, or 6 and enter SSN, Name or Person ID in the find by field. NOTE: If employee cannot be found by SSN, Name, or PID in the PAYU system, go to CNAM(space)Last Name, First Name, MI to find an SSN, 980#, or PID.

### 3.7 PAYMENT DISBURSEMENT ADD OR CHANGE (cont.)

```

ACPAYP2      2      PAYU: DISPLAY Direct Deposit Authorization      ACPAYM2
03/21/07                                           9:53 AM

  3  SSN ...: XXX-XX-XXXX  JONES, STEPHEN      Female      DOB: 02/02/45
     PrsnID: xxxxxxxx

  4  Effective Date ...: 09 09 2005

*ABA Routing Number: 291871352      ASSOCIATED BANK      6
  5                                     605 STATE STREET
     Account Number ...: 1_____      LA CROSSE, WI 54601

     Type of Account ...: C (C=Checking, S=Savings)

                                           Next SSN: _____
                                           Next Prsn: _____

Direct Command: _____ (09/09/05 *TRE)
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
  PREF  help  RETRN  QUIT  CHNG  STOP  AUDIT      HIST      menu
    
```

ITEM	TITLE	DESCRIPTION
2	<b>START/DISPLAY</b>	If a person and/or bank account information is not in the system, you will be taken back to the Main Menu, and a message will appear on the bottom of the screen saying "No person with SSN found. This means that the individual is not yet in the system and you must wait until the W-4 is entered to proceed. Set the form aside and try again at another time. If the bank account information is on the system, you will get the Display screen.
3	<b>SSN, NAME, GENDER, DOB/PERSON ID</b>	Identifying Information will be displayed on both the Start and the Display screen if the Person ID exists.
4	<b>EFFECTIVE DATE</b>	To Start an authorization the Effective Date will default to the current date. This date can be changed to a later date, but cannot be an earlier date.

### 3.7 PAYMENT DISBURSEMENT ADD OR CHANGE (cont.)

ITEM	TITLE	DESCRIPTION
5	<b>ABA ROUTING/ ACCT NUMBERS ACCT TYPE</b>	<p>To Start an authorization, enter the ABA Routing Number, Account Number, and Type of Account (C for checking, money market, or if no type indicated, and S for savings) from the Direct Deposit Authorization form.</p> <p>NOTE: If you are unable to find an ABA Routing Number in the system and there is no voided check or photocopy of a check attached to the Direct Deposit Authorization form, place cursor on the first number position of the field into which the ABA number is keyed and press F1 to get all ABA numbers. This only works if there is not an ABA number on file. Then:</p> <ul style="list-style-type: none"> <li>• Select state and/or city to view.</li> <li>• Mark correct line with an "X" and press enter.</li> <li>• Number will be entered in the ABA Routing Number field.</li> </ul> <p>Do not include any forms of punctuation such as a dash.</p> <p>If a Direct Deposit form has the same information as that which is already in the system, re-key the information and it will then have a new effective date.</p> <p>If the correct Bank Routing Number cannot be found in the system, email the payroll inbox at <a href="mailto:payroll@ohr.wisc.edu">payroll@ohr.wisc.edu</a>. Include the Bank Name, Address, Phone number, and Routing number in the email. If there is a new bank or routing number, it can only be added to the system by UWSC-Payroll Office.</p>
6	<b>ENTER</b>	<p>Upon entry, the Direct Deposit information will be displayed along with a message confirming update.</p> <p>Initial and date stamp the completed forms. File per your campus instructions.</p>
7	<b>NEXT SSN/NEXT PRSN</b>	<p>To enter or change a Direct Deposit authorization for another employee, enter SSN at NEXT SSN, or Person id in the NEXT PRSN field in the lower right side of the screen</p>
8	<b>CHNG</b>	<p>Press F4 to change a Direct Deposit Authorization. Enter the new ABA Routing, Account number, and type of account. An updated display screen is returned upon entry, and the prior authorization is stopped the day before the effective date of the change.</p>
9	<b>STOP</b>	<p>Press F5 to Stop a Direct Deposition Authorization. Enter the effective date of the Stop. The system will default to today's date, or can be changed to a future date. Write "stopped" on the form, initial, and date stamp it. File per your campus instructions.</p>
10	<b>AUDIT</b>	<p>Press F6 to view Payment Audit Trail List. See screen on next page. Press F6 again to return to the Display Direct Deposit Screen.</p>
11	<b>OTHER FUNCTION KEYS</b>	<p>If the cursor is on field prefaced with *, user lookup data values (name, UDDS, phone number) will be displayed for that field. Press F1 to display this information.</p> <p>Press F2 to return to previous screen without entry.</p> <p>Press F3 to quit (exit) the transaction.</p> <p>Press F12 to return to the main menu.</p>



### 3.7 PAYMENT DISBURSEMENT ADD OR CHANGE (cont.)

To view payment history; Type PAYU enter, Y enter, 4/SSN

```

ACPAYP5U                PAYU: Payment Audit Trail List, by SSN                ACPAYM5U
07/25/96                For SSN   xxx-xx-xxxx                1:11 PM

Action Name                Feeder    Net Amount    Date    Transaction
-----
1  _    JONES, STEPHEN        UW-PAYROLL    874.77    06/20/96    ACH
   _    JONES, STEPHEN        UW-PAYROLL    860.05    06/06/96    ACH
   _    JONES, STEPHEN        UW-PAYROLL    847.55    05/23/96    ACH
   _    JONES, STEPHEN        UW-PAYROLL    865.48    05/09/96    ACH
   _    JONES, STEPHEN        UW-PAYROLL    852.98    04/25/96    ACH
   _    JONES, STEPHEN        UW-PAYROLL    880.21    04/11/96    ACH
   _    JONES, STEPHEN        PRENOTES                03/20/96    Prenote
                                   *** End of Data ***

2 Next SSN: _____ Payments on or before: ___ __ __ (MM DD YY)
Direct Command: _____
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9-PF10--PF11--PF12---
3      help  retrn quit                AUTH  up    down                menu

Type a Select code and ENTER.
    
```

ITEM	TITLE	DESCRIPTION
1	LINE COMMAND (ACTION)	Place an "X" before the line you wish to view and press enter. Detail for payment is displayed. See following screen.
2	NEXT SSN	Enter the next SSN and/or date of which you wish to view payments.
3	FUNCTION KEYS	Press F2 to return to previous screen without entry. Press F3 to quit (exit) the transaction. Press F6 to return to the Authorization screen. Press F7 to scroll up to another page. Press F8 to scroll down to the next page. Press F12 to return to the main menu.

```

ACPAYP4                PAYU: Payment Audit Trail Display                ACPAYM4A
07/25/96                Net Amount ...: 874.78                1:14 PM
Name .....: JONES, STEPHEN                Payment Date : 07/18/96
SSN .....: xxxxxxxxxx
PID .....: 992
Reference:                Feeder Office: UW-PAYROLL

= = = = = ACH INFORMATION = = = = =

Bank Routing # ...: 275071398                SECURITY BANK, S.S.B
                                                184 W WISCONSIN AVE
Bank Account Type: Savings                MILWAUKEE, WI 53203-2507

ACH Transmission Group #: 199                Payment Sent: 07/11/96 11:55 PM
ACH Trace # .....: 0115

Voucher ..: 00799                Group ID : 199607700
Group Req: 233                Memo Text: PAYROLL

Direct Command: _____
Enter-PF1---PF2---PF3---PF4--PF5---PF6---PF7--PF8---PF9---PF10--PF11--PF12---
      help  retrn quit                AUTH                menu
    
```



### 3.9 VISA STATUS ADD OR CHANGE

This transaction is used to enter the Visa information for employees.

#### Enter Visa (space) SSN or PID

Person must be on person file (through PSID) in order to enter Visa.

```

NAME                PERSON ID                BIRTH
** DO NOT RELEASE **
ELIGIBILITY _ CERT DATE _ _ _ _ I-9 DEPT _
FIELD _
VISA INFORMATION    CONTACT _
TYPE                BEGIN DATE                END DATE                PURPOSE                COUNTRY                WORK
AUTH EXP DATE
_ 1 _ _ 2 _ _ 3 _ _ 4 _ _ 5 _

TAX STATUS: FED S 01 STATE S 01 TAX TREATY TAX RULES: FED STATE
Soc Sec
APPT ID BEGIN DATE END DATE % TITLE MAJOR DEPT
01133123 12 01 2006 05 27 2007 0 Z90NN A481200
(HONORARY ASSOC/FELLOW)
00558489 01 02 1999 11 30 2006 100 T32DN A481200
(SYSTEMS PROGRAMMER)
00070156 02 05 1989 06 10 1989 0 94870 A485700
(STUDENT HELP)

NEXT: _ 6 _ TP EXIT _ 7 _

1=HELP 2=ERR 3=STOP 4=W4EN 8 11=EXIT
    
```

ITEM	TITLE	DESCRIPTION
1	VISA TYPE	Tab down and enter visa type. See the listing for available Visa Status Types. The most commonly used types are F1, J1, H1, TN, and PR. Note: If they have an Employment Authorization Document (EAD card), enter the visa status they were in when obtaining the card, for example: F-1 for someone on Optional Practical Training (OPT), J2 for spouse of a J-1, or PP for someone who has applied for permanent residency. If someone has a visa type that is not on the listing, email Payroll & Financial Services at the UW Service Center at: <a href="mailto:payroll@ohr.wisc.edu">payroll@ohr.wisc.edu</a>
2	BEGIN DATE	Enter the begin date of the visa status from Section 5 of the I-20, Section 3 of the DS-2019, or the upper right section of the I-797. If they have a permanent resident card (green card), or an EAD card, enter the effective date on the card. If the begin date is not available, enter the date of entry into the U.S., or the start date of the appointment.

### 3.9 VISA STATUS ADD OR CHANGE (cont.)

<b>3</b>	<b>END DATE</b>	Enter the end date of the visa status from Section 5 of the I-20, Section 3 of the DS-2019, or the upper right section of the I-797. If they have an EAD card, enter the end date listed on the card. If they have a permanent resident card (green card), leave the end date blank.
<b>4</b>	<b>PURPOSE</b>	There are no edits between Visa Type and Purpose. Enter as follows: S = Study (All F1, F2, and J1{having the word "Student" in Section 4 of the DS-2019}) T = Teacher (non-student) R = Research (non-student) Note: No entry is required for a PR
<b>5</b>	<b>COUNTRY</b>	Enter the three digit code from Country Code List. Always use the country of permanent residence. No entry is required for a PR.
	<b>ENTER</b>	After entry is complete, press enter.
<b>6</b>	<b>NEXT</b>	If additional visas require entry, tab to Next and enter the next social security number or person id.
<b>7</b>	<b>TP EXIT</b>	If no additional visas, enter the transaction you want to access in TP EXIT field, or
<b>8</b>	<b>FUNCTION KEYS</b>	Press pf 4 to go to W4EN transaction screen. Press pf 11 to exit this transaction.

**3.10 INTERNATIONAL FORMS ADD OR CHANGE**

This transaction updates International tax information for an employee. Entry cannot be done unless employee's visa and appointment information has been entered through the VISA & APPT transactions.

**Type PYFMU enter**

```

PLEASE ENTER SSN OR PERSON-ID
                International Tax Forms Information                Program:  PYFMP01

1 Next SSN #/Person ID: _____

        Name:                               Country:
Person ID:
        SSN:      - -      Standard Exclusion:
YTD Gross:                YTD Codes: 15:                18:                19:

Form #  Form Name                Type of Date    Date    Entry Date  Rev
1123    ALIEN TAX INFORMATION      1st US Entry   __ 2  _____
1078    BENEFIT OF US RESIDENCE    Effective      __ 3  _____
1001    REDUCED RATE CERTIFICATE    Expiration     __ 4  _____
                        _____
8233    EXEMPTION FROM WITHHOLDING  Expiration     __ 5  _____
                        _____
7 Tax Override (According to W4): _ (Y/N/R/A)                _____
8 Substantial Presence Date:  __ __ __ Exception Found:  _
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
                10                DELE                PYFM2                EXIT
    
```

ITEM	TITLE	DESCRIPTION
<b>1</b>	<b>NEXT SSN OR PID</b>	Enter the SSN or PID
<b>2</b>	<b>FORM 1123 DATE</b>	Enter the date (mmddccyy) the individual first entered the U.S. from Section 4.A of the UW1123. However, do NOT enter the date from this section, if the status at that time was B1/B2-tourist. In this case, review Section 4.C. Enter the date the individual first entered in a status other than tourist. Important: If there is a break of more than a calendar year between visits (not counting tourist visits), enter the more recent entry date. You will also likely need to modify the substantial presence date. Contact UWSC for assistance.

### 3.10 INTERNATIONAL FORMS ADD OR CHANGE (cont.)

ITEM	TITLE	DESCRIPTION
3	<b>FORM 1078 DATE</b>	01/01/ccyy of the year the individual passes the substantial presence test is generally entered. Do NOT enter this date before the individual passes the test. This is the date the individual becomes a <b>Resident Alien for tax purposes</b> . If the individual will not become a resident alien until a future date, the UWSC will review and enter this date as part of the annual year end tax renewal process. There is no longer an actual "form 1078" in use. When this date is entered, the system ignores the PYFMU screen and uses the W4EN screen to determine taxation. Therefore, do not enter a 1078 date for an individual who is still using tax treaty benefits. Occasionally a date other than 01/01 is entered. Contact UWSC if you need assistance in entering this date.
4	<b>FORM 1001 DATE/NOW W-8 BEN</b>	Enter 2099, if the form is signed and reviewed for completeness and accuracy. This form is completed by an individual with an income code 15 (scholarship/fellowship) appointment to claim treaty benefits. File the original, as it is not sent to the IRS or UWSC. The form only needs to be completed once.
5	<b>FORM 8233 DATE/OR W-9 DATE</b>	<p><b>8233</b> – Enter 12/31 of the current year if the form is signed, verified for completeness, accuracy, and the appropriate revenue procedure statement has been received. Keep a copy for your files, and send the original to UWSC for the signature of the withholding agent and transmittal to the IRS. This form is completed by an individual with an income code 18 (teaching/research) or 19 (studying/training) appointment to claim treaty benefits. The 8233 and Rev Stmnt need to be completed annually to claim treaty benefits.</p> <p><b>W-9</b> – Enter 12/31/2099. This form is completed by a Resident Alien who is still eligible for tax treaty benefits (for example; a student from P.R. China in their 6<sup>th</sup> year in the U.S.). This form will be completed for any of the income codes, and only needs to be completed once. File the original, as it is not sent to the IRS or UWSC.</p> <p>NOTE: if this form is completed for an income code 15 appointment, enter 2099 in the Form 1001 Date Field (See #4 above).</p>
6	<b>REV STMNT</b>	If the appropriate revenue procedure statement (87-8 or 87-9) accompanies the 8233, enter a Y in this field. If it has not been received, or the wrong one was received, you may NOT enter the treaty benefits in the 8233 field. Keep a copy for your files, and send the original to UWSC with the 8233. NOTE: If you are entering the W-9 form in the 8233 field, leave the Rev Stmnt field blank, as the Rev Stmnt does not accompany this form.
7	<b>TAX OVERRIDE</b>	Enter a code of A, R, or Y to override the systems normal federal and state tax calculation for nonresident aliens. Enter N to remove the code. See the "Tax Override" code chart for details on the use of these codes. Contact UWSC before entering one of these codes.

### 3.10 INTERNATIONAL FORMS ADD OR CHANGE (cont.)

ITEM	TITLE	DESCRIPTION
8	<b>SUBSTANTIAL PRESENCE DATE</b>	The system will automatically calculate this date and populate the field, if the appointment has been entered. Always verify that the date appears to be correct. Reasons this date may need to be modified include (but are not limited to): individual is on optional practical training, individual is NOT in F or J visa status, individual has a break of more than a calendar year between visits (not counting tourist visits). Do not modify this date without contacting UWSC.
	<b>ENTER</b>	Press enter when entry is complete <u>OR</u>
1	<b>NEXT SSN or PID</b>	Press the Home key, or tab to the top of the screen and type in the next SSN or PID to be processed. Press enter.
10	<b>FUNCTION KEYS</b>	<p>PF5 Delete- Place your cursor on the first character of the field you want to delete and press the PF5 key.</p> <p>PF9 PYFM2- Press to go to the PYFM2 screen to override the title code. This is most often done for individuals on optional practical training. Contact UWSC for assistance.</p> <p>PF11 Exit- Press to exit the transaction.</p>

**APPENDIX 1.0 COUNTY CODE LIST**

Adams	01	Iowa	25	Polk	48
Ashland	02	Iron	26	Portage	49
Barron	03	Jackson	27	Price	50
Bayfield	04	Jefferson	28	Racine	51
Brown	05	Juneau	29	Richland	52
Buffalo	06`	Kenosha	30	Rock	53
Burnett	07	Kewaunee	31	Rusk	54
Calumet	08	LaCrosse	32	St. Croix	55
Chippewa	09	Lafayette	33	Sauk	56
Clark	10	Langlade	34	Sawyer	57
Columbia	11	Lincoln	35	Shawano	58
Crawford	12	Manitowoc	36	Sheboygan	59
Dane	13	Marathon	37	Taylor	60
Dodge	14	Marinette	38	Trempealeau	61
Door	15	Marquette	39	Vernon	62
Douglas	16	Menominee	72	Vilas	63
Dunn	17	Milwaukee	40	Walworth	64
Eau Claire	18	Monroe	41	Washburn	65
Florence	19	Oconto	42	Washington	66
Fond du Lac	20	Oneida	43	Waukesha	67
Forest	21	Outagamie	44	Waupaca	68
Grant	22	Ozaukee	45	Waushara	69
Green	23	Pepin	46	Winnebago	70
Green Lake	24	Pierce	47	Wood	71
				Outside WI	99



**APPENDIX 2.0 STATE AND TERRITORY ABBREVIATIONS**

Alabama	AL	Kentucky	KY (NT)	Ohio	OH
Alaska	AK	Louisiana	LA	Oklahoma	OK
Arizona	AZ	Maine	ME	Oregon	OR
Arkansas	AR	Maryland	MD	Pennsylvania	PA
California	CA	Massachusetts	MA	Puerto Rico	PR
Colorado	CO	Michigan	MI (NT)	Rhode Island	RI
Connecticut	CT	Minnesota	MN (NT)	South Carolina	SC
Delaware	DE	Mississippi	MS	South Dakota	SD
Dist of Columbia	DC	Missouri	MO	Tennessee	TN
Florida	FL	Montana	MT	Texas	TX
Georgia	GA	Nebraska	NE	Utah	UT
Guam	GU	Nevada	NV	Vermont	VT
Hawaii	HI	New Hampshire	NH	Virginia	VA
Idaho	ID	New Jersey	NJ	Virgin Islands	VI
Illinois	IL (NT)	New Mexico	NM	Washington	WA
Indiana	IN (NT)	New York	NY	West Virginia	WV
Iowa	IA	North Carolina	NC	Wisconsin	WI
Kansas	KS	North Dakota	ND	Wyoming	WY

### **APPENDIX 3.0 PAYMENT DISBURSEMENT PURGING PROCESS & SCHEDULE**

To avoid having old payment disbursement records on file, the UWSC developed a purging routine that "inactivates" the ACH payment disbursement record if it has not been used to process a payroll payment for a period of twelve (12) months. The purge process is run the first of each month.

The program is setup in the automatic scheduler to be run the first day of each month, however, if the first of the month falls on a Saturday or Sunday, the job runs the following Monday. The program always counts back twelve "12" months from the first day of the month in which the job is run.

A microfiche is produced of the records that are "inactivated" every six months. Information on ACH records that are "inactivated" by this program can be viewed in the Payment Disbursement under the audit function.

<b>ACH Purge Run Date</b>	<b>Purges ACH Record if ACH Record Has NOT Been Used to Process a Payment On Or Before</b>
<b>1/1/07</b>	<b>12/31/05</b>
<b>2/1/07</b>	<b>01/31/05</b>
<b>3/1/07</b>	<b>02/28/05</b>
<b>4/2/07</b>	<b>03/31/05</b>
<b>5/1/07</b>	<b>04/30/05</b>
<b>6/1/07</b>	<b>05/31/05</b>
<b>7/2/07</b>	<b>06/30/05</b>
<b>8/1/07</b>	<b>07/31/05</b>
<b>9/3/07</b>	<b>08/31/05</b>
<b>10/01/07</b>	<b>09/30/05</b>
<b>11/01/07</b>	<b>10/31/05</b>
<b>12/03/07</b>	<b>11/30/05</b>

**APPENDIX 4.0 VISA STATUS TYPES**

A1	Diplomatic	H4	Family/H1-H3
A2	Gov't Official	I	Media Rep
A3	Family/A1-A2	J1	Exchange Visitor
B1	Business Visitor	J2	Family/J1
B2	Tourist	K1	Fiancé(e)
EA	Empl Auth Card	K2	Fiancé(e) Child
ED	Ext Departure	L1	Transferee
E1	Treaty Trader	L2	Family/L1
E2	Treaty Investor	M1	Student (Tech)
E3	Australian Treaty Worker	M2	Family/M1
F1	Student	O1	Extraordinary Ability
F2	Family/F1	P1	Athletes
G1	Int'l Org - Rep	P2	Artist/Entertainer
G2	Int'l Org - Rep	P3	Artist (Cultural)
G3	Int'l Org - Rep	PP	Pending PR
G4	Int'l Org - Office	PR	Permanent Resident
G5	Family/G1-G4	Q	Cultural Exch Visitor
H1	Distinguished Worker	RF	Refugee (or Asylee)
H2	Temporary Worker	TN	Temp Canadian (NAFTA)
H3	Trainee	VD	Vol Departure

**APPENDIX 5.0 COUNTRY CODES**

798	ABU DHABI (UNITED ARAB EMIRATES)	549	GEORGIA	692	NEW ZEALAND
817	ADEN (YEMAN)	552	GERMANY	696	NICARAGUA
404	AFGHANISTAN	556	GHANA	698	NIGER
408	ALBANIA	560	GREAT BRITAIN (UNITED KINGDOM)	700	NIGERIA
412	ALGERIA	564	GREECE	750	NORTHERN GRENADINES (ST. VINCENT)
411	ANDORRA	568	GREENLAND	560	NORTHERN IRELAND (United Kingdom)
414	ANGOLA	570	GRENADA & SOUTHERN GRENADINES	708	NORWAY
413	ANTIGUA AND BARBUDA	571	GUADELOUPE	714	OMAN
416	ARGENTINA	572	GUATEMALA	716	PAKISTAN
418	ARMENIA	573	GUINEA	720	PANAMA
419	ARUBA	574	GUINEA-BISSAU	722	PAPUA NEW GUINEA
420	AUSTRALIA	575	GUYANA	724	PARAGUAY
424	AUSTRIA	576	HAITI	728	PERU
423	AZERBAIJAN	580	HONDURAS	732	PHILIPPINES
426	BAHAMAS	584	HONG KONG	736	POLAND
429	BAHRAIN	592	HUNGARY	740	PORTUGAL
604	BALI (INDONESIA)	596	ICELAND	374	PUERTO RICO
425	BANGLADESH	600	INDIA	741	QATAR (KATAR)
427	BARBADOS	604	INDONESIA	742	REUNION
457	BELARUS (BYELARUS)	479	INNER MONGOLIA (P.R. OF CHINA)	744	ROMANIA
428	BELGIUM	608	IRAN	754	RUSSIA
604	BELITUNG (INDONESIA)	612	IRAQ	745	RWANDA
433	BELIZE	616	IRELAND, REPUBLIC OF (ERIE)	746	RYUKYU ISLANDS
502	BENIN (DAHOMEY)	618	ISLE OF MAN	752	SAUDI ARABIA
430	BERMUDA	620	ISRAEL	560	SCOTLAND (UNITED KINGDOM)
431	BHUTAN	624	ITALY	758	SENEGAL
432	BOLIVIA	626	IVORY COAST (COTE D'IVOIRE)	755	SERBIA
435	BOSNIA-HERZEGOVINA	628	JAMAICA	759	SEYCHELLES
434	BOTSWANA	632	JAPAN	760	SIERRA LEONE
436	BRAZIL	604	JAVA (INDONESIA)	763	SINGAPORE
486	BRAZZAVILLE (CONGO)	636	JORDAN	757	SLOVAKIA
447	BRUNEI	460	KAMPUCHEA (CAMBODIA)	762	SLOVENIA
452	BULGARIA	741	KATAR (QATAR)	766	SOMALIA
802	BURKINA FASO (UPPER VOLTA)	638	KAZAKHSTAN	767	SOUTH AFRICA
456	BURMA	640	KENYA	773	SOUTH GEORGIA
458	BURUNDI	641	KIRIBATI	774	SOUTH SANDWICH ISLAND
457	BYELARUS (BELARUS)	643	KOREA, DEM PEOPLE'S (NORTH)	768	SPAIN
460	CAMBODIA (KAMPUCHEA)	644	KOREA, REPUBLIC OF (SOUTH)	769	SRI LANKA
462	CAMEROON	645	KOSOVO	747	ST. HELENA
464	CANADA	646	KUWAIT	748	ST. KITTS & NEVIS
468	CAPE VERDE	647	KYRGYZSTAN	749	ST. LUCIA
469	CAYMEN ISLANDS	648	LAOS	750	ST. VINCENT (NORTHERN GRENADINES)
470	CENTRAL AFRICAN REP	650	LATVIA	770	SUDAN
474	CHAD	652	LEBANON	604	SUMATRA (INDONESIA)
476	CHILE	654	LESOTHO	764	SURINAM
479	CHINA, PEOPLES REP	656	LIBERIA	771	SWAZILAND
484	COLOMBIA	660	LIBYA	772	SWEDEN
485	COMOROS	661	LIECHTENSTEIN	776	SWITZERLAND
486	CONGO (BRAZZAVILLE)	658	LITHUANIA	780	SYRIA
825	CONGO, DEM REP OF (CONGO)	664	LUXEMBOURG	480	TAIWAN
488	COSTA RICA	663	MACAO (MACAU)	781	TAJIKSTAN
626	COTE D'IVOIRE (IVORY COAST)	663	MACAU (MACAO)	783	TANZANIA, UNITED REP OF
490	CROATIA	657	MACEDONIA	784	THAILAND
492	CUBA	666	MADAGASCAR (MALAGASY REP)	479	TIBET (PEOPLES REP OF CHINA)
496	CYPRUS	666	MALAGASY REP (MADEGASCAR)	604	TIMOR (INDONESIA)
499	CZECH REPUBLIC	665	MALAWI	786	TOGO
502	DAHOMEY (BENIN)	667	MALAYSIA	787	TONGA
504	DENMARK	669	MALI	788	TRINIDAD & TOBAGO
505	DJIBOUTI	668	MALTA	790	TUNISIA
506	DOMINICA	479	MANCHURIA (P.R. OF CHINA)	792	TURKEY
508	DOMINICAN REPUBLIC	337	MARSHALL ISLANDS	793	TURKMENISTAN
516	ECUADOR	662	MARTINIQUE	795	UGANDA
415	EGYPT, ARAB REP OF	671	MAURITANIA	803	UKRAINE
522	EL SALVADOR	670	MAURITUS	798	UNITED ARAB EMIRATES (ABU DHABI)
560	ENGLAND (UNITED KINGDOM)	672	MEXICO	560	UNITED KINGDOM
526	EQUATORIAL GUINEA	677	MOLDOVA	802	UPPER VOLTA (BURKINA FASO)
616	ERIE (REPUBLIC OF IRELAND)	604	MOLUCCAS (INDONESIA)	804	URUGUAY
528	ERITREA	674	MONGOLIA	805	UZBEKISTAN
529	ESTONIA	659	MONTENEGRO	806	VATICAN CITY
532	ETHIOPIA	675	MONTSERRAT	808	VENEZUELA
534	FIJI	676	MOROCCO	810	VIETNAM
536	FINLAND	678	MOZAMBIQUE	560	WALES (UNITED KINGDOM)
604	FLORES (INDONESIA)	679	NAMIBIA	820	WEST BANK
540	FRANCE	680	NEPAL	817	YEMEN (ADEN)
544	FRENCH GUIANA	684	NETHERLANDS	825	ZAIRE
546	GABON	686	NETHERLANDS ANTILLES	830	ZAMBIA
548	GAMBIA	688	NEW CALEDONIA	850	ZIMBABWE
543	GAZA STRIP				

**APPENDIX 6.0 JOB TITLES AND INCOME CODES**

<b>Purpose: Fellowship/Scholarship</b>		<b>INCOME CODE 15</b>
<b>Job Title (Appointment)</b>	<b>Job (Appointment) Type</b>	<b>Appointment Code</b>
Post Doctoral Fellow	Employee-in-Training	X10NN
Post Doctoral Trainee	Employee-in-Training	X30NN
Graduate Intern/Trainee	Employee-in-Training	X75NN
Fellow	Student Assistant	Y21NN
Scholar	Student Assistant	Y22NN
Trainee	Student Assistant	Y23NN
Advanced Opportunity Fellow	Student Assistant	Y26NN
<b>Purpose: Teaching/Research</b>		<b>INCOME CODE 18</b>
<b>Job (Appointment) Title</b>	<b>Job (Appointment) Type</b>	<b>Appointment Code</b>
Faculty	Faculty	
Academic Staff	Academic Staff	
Academic Staff	Limited	
Research Associate	Employee-in-Training	X01NN
<b>Purpose: Studying and Training</b>		<b>INCOME CODE 19</b>
<b>Job (Appointment) Title</b>	<b>Job (Appointment) Type</b>	<b>Appointment Code</b>
Research Intern	Employee-in-Training	X50NN
Post Grad Trainee 1	Employee-in-Training	X61NN
Post Grad Trainee 2	Employee-in-Training	X62NN
Post Grad Trainee 3	Employee-in-Training	X63NN
Post Grad Trainee 4	Employee-in-Training	X64NN
Post Grad Trainee 5	Employee-in-Training	X65NN
Post Grad Trainee 6	Employee-in-Training	X66NN
Post Grad Trainee 7	Employee-in-Training	X67NN
Intern (Non-Physician)	Employee-in-Training	X70NN
Teaching Assistant-Inexp	Student Assistant	Y32NN
Teaching Assistant-Exp	Student Assistant	Y33NN
Program Assistant	Student Assistant	Y42NN
Project Assistant	Student Assistant	Y43NN
Undergraduate Assistant	Student Assistant	Y51NN
Undergraduate Intern	Student Assistant	Y52NN
Student Hourly	Student Hourly	94870
Other Appointments (house fellows, Employee-in-Training.)	Other	
Classified Permanent	Classified Permanent	
Classified Project	Classified Project	
Classified Limited-Term-Employee	Classified LTE	
Research Assistant	Student Assistant	Y41NN
Graduate Assistant	Student Assistant	Y44NN

**APPENDIX 7.0 SPECIAL "TAX OVERRIDE" CODES FOR NON-RESIDENT ALIENS**

5/31/06

	<b>FEDERAL TAX</b>	<b>STATE TAX</b>
<p><b>"Y" CODE</b>                      FULL Override – both Federal &amp; State</p> <p><u>Use for:</u>                      1. India Students                      2. Living &amp; Working Outside the U.S.</p>	<p>NO Gross Up                      Taxes Per W-4 screen:                      India Students MUST claim Single – 1 allowance                      Living &amp; Working Outside the U.S. – enter "NT"</p>	<p>NO Gross Up                      Taxes Per W-4 screen:                      India Students MUST claim Single – 1 allowance                      Living &amp; Working Outside the U.S. – enter "NT"</p>
<p><b>"R" CODE</b>                      Override for STATE ONLY</p> <p><u>Use for:</u>                      1. Reciprocal States                      2. Living &amp; Working Outside Wisconsin</p>	<p>Regular programmed NRA processing:                      Gross Up                      Taxes as Single – 1 allowance                      Does NOT look at W-4 screen</p>	<p>NO Gross Up                      Taxes per W-4 screen:                      reciprocal states – enter "NT"                      living &amp; working outside of Wisconsin – enter "NT"</p>
<p><b>"A" CODE</b>                      Override for Federal &amp; State NUMBER OF ALLOWANCES ONLY</p> <p><u>Use for:</u>                      1. Canada or Mexico, if claiming dependents (more than 1 allowance) on W-4                      2. Korea – Use this code IF dependents are in the U.S. Note: if the person is using treaty benefits, do NOT use this code.</p>	<p>Gross Up                      Taxes per W-4 screen:                      MUST claim Single (even if married), but                      May claim more than 1 allowance</p>	<p>NO Gross Up                      Taxes per W-4 screen:                      MUST claim Single (even if married), but                      May claim more than 1 allowance</p>