

# Payroll Working Group Meeting Minutes

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Date: May 18, 2023

Time: 3 – 4 p.m.

Microsoft Teams Meeting

Welcome & Roll Call

## **New Earning Codes – Sri Kamarthi**

- TEES has submitted an enhancement request for two new earning codes
- ***Administrative Stipend – Additional***
  - When Faculty have multiple administrative stipends, currently they are combining them into one admin stipend allowance. This makes it difficult to differentiate them in reporting. It would be much cleaner if we could add separate lines per stipend.
- ***Teaching in Excess – Prorated***
  - Current allowance plan for Teaching in Excess does not prorate.
  - Engineering would like to start using this new allowance to track teaching in excess appointments (many each semester), but as it is currently set up, it cannot be used as the allowance type will not pay for partial months.

## **Study Abroad – Sri Kamarthi**

- TAMU has submitted an enhancement request to create a new allowance plan for Study Abroad as there are over 50 employees who will participate in Study Abroad this summer and they would like for the money to be encumbered.
- Currently this is setup only as a one-time payment - For proctoring or chaperoning a study abroad course; generally used for faculty employees on 9-month Academic Pay Period.

## **Costing Allocation Access – Sri Kamarthi**

- Compensation View Only and Compensation Partner roles now have access to view costing allocation information

## Multiple payslip printing – Sri Kamarthi

- Workday has the ability to allow printing multiple payslips at once. This is currently turned off
- This can be turned off for all system members. No option to Opt-In/Opt-Out

Q: Does everyone find this feature useful?

A: Unanimous Yes

## To Do step when citizenship status change or VISA status change – Sri Kamarthi

- TEES submitted an enhancement request to add a new To Do step when there is a citizenship change from a non-resident alien to a permanent resident
- The To Do step will go to Payroll Partner/Tax Compliance Partner role so tax coding can be updated
- Currently we have a report - Employee Citizenship and VISA Status report

Q: Is anyone else interested in this feature?

A: Yes - TAMUCT, Shannon Ham, Marvin Williams, TAMUSA, TAMU, TEES

## Notification to employee during address update for out of the state of Texas – Sri Kamarthi

- Notification is needed to inform the employees about the potential tax implications when they have an address out of the state of Texas
- This was brought up in Staffing Working Group meeting and the group wants to add the notification
- Along with the notification, we can also update the help text in Complete State and Local Withholding Elections step

Q: What is the current text of the notification?

A: Current Help Text:

Help Text
<p>The State W-4 Form is used to calculate withholding amounts for state and local income taxes. State and Local Withholding is only valid for the state and municipality of your residence and/or work location.</p> <ul style="list-style-type: none"><li>• If you live in a state listed in the drop down menu below, you can elect withholding for your residence</li><li>• If you work in a state listed in the drop-down menu below, you can elect withholding for your work location</li><li>• If your state is not listed in the drop-down menu below, select <b>Cancel</b> and contact your payroll partner</li></ul> <p><b>NOTE:</b> Any changes you submit will take effect on your next pay date, provided the payroll for that pay date has not already been processed. Generally, biweekly payrolls are processed three days prior to the pay date. Monthly payrolls are usually processed 9 to 12 days prior to the pay date.</p> <p>For assistance on completing or updating your tax withholding elections in Workday, please contact your payroll office.</p>

Q: When will the employee see the notification? After they enter their address?

A: Yes, once the address change is submitted

Q: Will it also direct them to complete a state tax election?

A: Yes

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Save for Summer EIB for FY24 deductions will be loaded on 5/25

## EIB Due Dates – Scott Ritter

Pay Date	Due Date for Completed EIB Template
June 2, 2023	Wednesday May 24, 2023
June 16, 2023	Thursday June 8, 2023
June 30, 2023	Thursday June 22, 2023
July 3, 2023	Friday June 16, 2023
July 14, 2023	Thursday July 6, 2023

The minimum is close to 50 as possible

An authorized individual is the one submitting the Request for Mass Load (EIB) form on the Workday Help Website

Please do not alter the formatting or add formulas to the spreadsheet.