Paperless New Hire Process

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Payroll Conference 2014
The Evolution of Self-Service

- Direct Deposit: 2005
- Federal Withholding Form W-4: 2008
- Indiana State Withholding Form WH-4: 2012

How do we take advantage of our self-service abilities?
How do we make it work?

- Electronic, self-service forms already in place

- Employees need to be directed to the forms
  - Ideally this would be automated so we can eliminate the need for new employees to meet with someone in person to fill out forms.

- Once we notify employees, how do we encourage completion of the forms?
The “How” = The IUPY096 process

- **Job actions**
  - Upon final approval of Hire eDoc
  - Only one current active job
  - One day delay before process picks up

- **Email**
  - Uses primary and alternate email
  - If no email is detected, IUPY096 reevaluates nightly until 2 weeks after hire effective date or job action date, whichever is greater

- **New Employee Portal**
  - A visual checklist for employees to complete
  - Only appears in OneStart for first 60 days of employment
New Hire Email Process

- **Hire eDoc is final approved/saved to HRMS**
- **IUPY096 runs nightly and examines previous day hires (action date)**
- **Does the employee have any other active* jobs?**
  - Yes: Do not send email
  - No: Determine which email address to use

- Determine which email address to use
  - No: Send email with self service links
  - Yes: Does employee have IU email address?
    - No: Send email with IU acct instructions and self service links
    - Yes: Does employee have non-IU email address?
      - No: Does IUPY096 detect an email address?
        - No: Add employee ID to queue and check for email addresses
        - Yes: Output Report for followup
      - Yes: Go to previous decision point

*This process ignores terminated jobs, 18/20 Retiree, fellowship and no pay volunteer hires.*
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The New Hire Email

Name:

University ID: 0000000000

Department ID: BA-IMAU

Welcome to Indiana University from the payroll department!

To ensure you are paid in a timely and accurate fashion there are a few things we need you to do. The first is to create your IU Network ID and email accounts. Go to http://itaccounts.iu.edu and do the following:

1. Select "Create my first IU computing accounts"
2. Enter your last name, birth date, and 10 digit University ID number (found above)
3. Read through and agree to the policies for IT account use
4. Select the type of email account you would like
5. Create your IU passphrase
6. Enroll in the Self-Service Passphrase Reset system

Once those steps have been completed, it will usually take up to 24 hours before all of your accounts are active in the system.

1. Visit the New Employee Portal and complete your Direct Deposit, tax forms, and Electronic W-2 Consent forms.
   o NOTE: If you have an F, J, or H1 visa, you will not be able to complete the tax forms online. Please see below.**
2. Complete each action item that contains a red "enter now" button under the status before or during your first week of work.
3. A green checkmark will replace the red button once successfully completed.
4. View the Health Insurance Marketplace Notice for basic information about options available under the Affordable Care Act.
5. Be sure to check the New Employee Portal again after receiving your first paycheck to verify your withholdings and deductions are correct.

Use the OneStart Employee Center to view/edit your employee information (including above data) and access your paycheck detail.

If you have questions or require assistance, use the FMS Support Form (or contact your campus payroll office).

We appreciate the opportunity to serve you!

**All employees with a visa are required to complete the International Tax Questionnaire in order to ensure proper taxation instead of tax forms online. If you have any questions about completing the form, please contact taxpayer@indiana.edu.
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# New Employee Portal

## New Employee Channel

<table>
<thead>
<tr>
<th>COMPLETE BY THE END OF FIRST WEEK</th>
<th>STATUS</th>
<th>ACTIVITY DATE (prior 60 days only)</th>
<th>NEED HELP?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct Deposit Sign-up</td>
<td>enter now</td>
<td></td>
<td>Self Service Instructions</td>
</tr>
<tr>
<td>Federal Tax Form W-4</td>
<td>enter now</td>
<td></td>
<td>FMS Support Contact Form</td>
</tr>
<tr>
<td>State/Local Tax Form WH-4</td>
<td>enter now</td>
<td></td>
<td>Contact: 812-855-0375</td>
</tr>
<tr>
<td>Consent for Electronic W-2 Delivery</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Federal Health Care Marketplace Notice</td>
<td>view</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## COMPLETE AFTER RECEIVING YOUR FIRST PAYCHECK

- **Review your Paychecks**: Verify your pay rate, taxes and deductions are as expected. Depending on the deduction schedule and your enrollment date, some deductions may not be on your first check. Scroll down to the Payroll Information section and click "view" next to Current Paycheck.

- **Review your attributes in the Employee Center**: Review your personal information and benefits enrollment to verify they are correct. Click on the Benefits or Employee Information section in the menu on the left.

MORE INFO: FMS Support
Employee Issues

- Out-of-State
- NRA
- No Network accounts
- Employee did not receive email
Did it work?

- In 2011 over 20,000 forms were collected, entered and retained

- The process was turned on near the end of 2012. In the first few months, here’s what happened:
  - Tax updates processed by the central office changed from 54% to 14%
  - Direct Deposit updates processed by central office changed from 46% to 10%

- 2013: 3.86% of tax forms updated by central office users, 493 tax forms total

- 2014: 1.36% of tax forms updated by central office users, 223 tax forms total
W-2 Consent – Bonus!!!

- 2011: 49,800 W-2s, 30% consent rate with W-2 express
- 2012: 50,600 W-2s, 50% consented
- 2013: 50,311 W-2s, 64% consented
- 2014: 50,530 W-2s, 75% consented
- 2015: Expecting 50,500 W-2s, 78% currently consented
Questions?