Payroll Training

April 11, 2024

University of Pittsburgh

The Payroll Department

Who We Are and What We Do

University of Pittsburgh

Our Mission

Payroll is committed to producing an accurate and timely payroll.

For us to fulfill this commitment, we rely on you – our Administrators. Whether your job involves Pitt Worx actions, reviewing the preview payroll registers, submitting retry payroll requests, or changing/approving timecards, you are an essential part of the process in making certain that each University employee is paid accurately and on time.

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Areas within Payroll

Under the Office of the SVC/Chief Financial Officer

Operations

- Customer Service
  - Dedicated team to review and respond timely and accurately to high-level payroll inquiries
- Pay Analysis
- Handle retry requests
- Review error reports to correct issues before payroll processing
- Process Off-Cycle payments and Off-Cycle payrolls
- Calculations of pay adjustments and overpayments
- Foreign National tax analysis and issuing tax treaties
- All questions and analysis on Forms W-2 and Forms 1042-S
- Process employee involuntary deductions
- Banking requests (reversals, stop pays, notifications of change)

HRIS

- Process and calculate the Biweekly, Monthly, and UPP2 payrolls
- Test and approve new HCM releases
- Process retry and reversal requests
- Run and review audit reports and error reports prior to payroll processing
- Transmit outbound files (e.g. check and ACH files)
- Process inbound files from within Pitt and from external sources (e.g. United Way Parking, etc)
- Work on system and process enhancements and continuous improvement

Accounting

- Account reconciliations
- Prepare monthly journal entries
- Balance and import costing for all payroll transactions
- Review, reconcile and approve data for benefit payments

Tax

- Balances tax data and files quarterly taxes thru ADP
- Balances Forms W-2 and Forms 1042-S
- Make tax deposits for withheld taxes
- Sets up and manages compliance for Multi-state taxes

All areas within Payroll work to ensure compliance with Federal, State, and Local laws and regulations and provide prompt, competent, and excellent customer service when paying employees

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Department Administrator Role

Department administrators may have access to:

- Run payroll registers
- View the TEAM form
- Edit existing primary and subsequent tasks
- Submit and approve timecards on behalf of employees

Depending on your access, not all functions listed above may apply to you

Please see the additional access information on the OHR website for more details

Pitt Worx Appointments, Changes, ICPs

Department

- Processes new hires
- Processes changes and ICPs through Pitt Worx

HR Shared Services

- Review appointment updates, contract dates, and Individual Compensation Plan (ICP)
- Reviews TEAM form updates

Payroll Operations

- Calculate and enter pay adjustment if needed
- Tax analysis for foreign nationals
- Review daily error reports
- Preview payroll register retry requests
- Reversals
- Process off-cycle employee payments and payrolls

Pitt Worx Processing Procedures

The Pitt Worx resources sharepoint site can be of great assistance when submitting Pitt Worx action changes. It provides navigation instructions, reference guides, contains a glossary and more.

Standard operating procedures for submitting action flows to be approved can be found here. This resource provides information on submitting Employee Action changes correctly.

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Time Cards: Staff, All Temps, & Students

- Hours must be reported to Payroll for each pay period through daily entry in Time and Absences of Pitt Worx by all Non-Exempt Staff, Temporary Staff, Student Workers and Federal Work Study Students.
- Exempt Staff only need to submit timecards for exception processing. Instructions can be found here.
- Deadlines for reporting hours are published on the Payroll department website at: http://payroll.pitt.edu/calendar/.
- Salary, Compensatory and Overtime schedules can be found at http:www.payroll.pitt.edu by selecting the Staff role and then My Pay.
- Resources on submitting time cards can be found here.
- For time card questions, submit an inquiry to our ERM Customer Service Support Center here: **https://www.hr.pitt.edu/contact-ohr**.

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When do I receive my Monthly pay?

To find all available pay schedules, please visit **payroll.pitt.edu** and select Schedules & Deadlines.

Pay Period Start Date	Pay Period End Date	Pay Date
January 1, 2024	January 31, 2024	January 31, 2024
February 1, 2024	February 29, 2024	February 29, 2024
March 1, 2024	March 31, 2024	March 29, 2024
April 1, 2024	April 30, 2024	April 30, 2024
May 1, 2024	May 31, 2024	May 31, 2024
June 1, 2024	June 30, 2024	June 28, 2024
July 1, 2024	July 31, 2024	July 31, 2024
August 1, 2024	August 31, 2024	August 30, 2024
September 1, 2024	September 30, 2024	September 30, 2024
October 1, 2024	October 31, 2024	October 31, 2024
November 1, 2024	November 30, 2024	November 27, 2024
December 1, 2024	December 31, 2024	December 31, 2024

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When do I receive my Biweekly pay?

To find all available pay schedules, please visit **payroll.pitt.edu** and select Schedules & Deadlines.

Pay Period	Pay Period Start Date	Pay Period End Date	Pay Date	Pay of the Month
1	December 24, 2023	January 6, 2024	January 12, 2024	**1st**
2	January 7, 2024	January 20, 2024	January 26, 2024	**2nd**
3	January 21, 2024	February 3, 2024	February 9, 2024	**1st**
4	February 4, 2024	February 17, 2024	February 23, 2024	**2nd**
5	February 18, 2024	March 2, 2024	March 8, 2024	**1st**
6	March 3, 2024	March 16, 2024	March 22, 2024	**2nd**
7	March 17, 2024	March 30, 2024	April 5, 2024	**1st**
8	March 31, 2024	April 13, 2024	April 19, 2024	**2nd**
9	April 14, 2024	April 27, 2024	May 3, 2024	**1st**
10	April 28, 2024	May 11, 2024	May 17, 2024	**2nd**
11	May 12, 2024	May 25, 2024	May 31, 2024	**3rd**
12	May 26, 2024	June 8, 2024	June 14, 2024	**1st**
13	June 9, 2024	June 22, 2024	June 28, 2024	**2nd**

When do I receive my Biweekly pay? (Cont.)

Pay Period	Pay Period Start Date	Pay Period End Date	Pay Date	Pay of the Month
14	June 23, 2024	July 6, 2024	July 12, 2024	**1st**
15	July 7, 2024	July 20, 2024	July 26, 2024	**2nd**
16	July 21, 2024	August 3, 2024	August 9, 2024	**1st**
17	August 4, 2024	August 17, 2024	August 23, 2024	**2nd**
18	August 18, 2024	August 31, 2024	September 6, 2024	**1st**
19	September 1, 2024	September 14, 2024	September 20, 2024	**2nd**
20	September 15, 2024	September 28, 2024	October 4, 2024	**1st**
21	September 29, 2024	October 12, 2024	October 18, 2024	**2nd**
22	October 13, 2024	October 26, 2024	November 1, 2024	**1st**
23	October 27, 2024	November 9, 2024	November 15, 2024	**2nd**
24	November 10, 2024	November 23, 2024	November 27, 2024	**3rd**
25	November 24, 2024	December 7, 2024	December 13, 2024	**1st**
26	December 8, 2024	December 21, 2024	December 27, 2024	**2nd**

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What Hours are included in my Biweekly pay?

Payout Timelines for Compensatory and Overtime

Staff

Compensatory time

- Automatically calculated when eligible time exceeds 37.5.
- No more than 2.5 hours of compensatory time can be accrued in one week.
- Will automatically populate as Comp Time Paid on the timecard and will pay at the employee's standard rate on the pay date for the pay period in which it was submitted.
- Compensatory time being used as time off must be manually submitted by an employee's supervisor on the timecard as Comp Time Accrued and must be submitted as Comp Time Taken by the end of the following pay period.
- Any accrued compensatory time not taken as time off will be automatically paid on the pay date following the deadline to be used as time off.
- Please contact your supervisor for the compensatory time accrual and pay out policy for your department.

Overtime

- Automatically calculated when hours worked exceeds 40 per week.
- Paid at 1.5 times regular rate on the pay date for the pay period in which it was submitted.

*Compensatory time and overtime submitted or approved after the timecard deadline, will not be paid until the pay date following timely approval.

*Please refer to OHR Compensation for the types of hours that count towards compensatory time and overtime.

Reviewing Approved Employee actions

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Department Administrator Role

This role gives you the ability to view and print your Payroll Register Reports and OTL report by Department/CDC for all types of employees. This role allows access to the following reports:

- **Core HR Folder**
  - PHRR313 I9 Status of Pending - No Report
    - Shows incomplete I-9 status for employees in Pitt Worx
- **Payroll Folder**
  - PRR310 I-9 Expiration Report
    - Shows expiring I-9 for employees in Pitt Worx
- **Time and Labor Folder**
  - OTL Cumulative Time Off Report
    - Shows cumulative time off taken per employee per time type, as well as department totals (calculates all time off taken per department).
  - Weekly Timecard Report
    - Report on weekly timecards. Displays timecard status and hours entered per day/hour type.
  - OTL Supervisors with Designated Role
    - Report on employees and their assigned supervisor.
  - Time Off History Report
    - Provides history of time off taken per employee, per week/day/time type, for a given date range.

Additional reports and instructions can be found here

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Reviewing Approved Pitt Worx Actions

- It is essential to review approved employee actions for new appointments and changes. This critical step ensures that the correct information has been reviewed prior to payroll processing.
- If actions cannot be approved in time for the payroll, please refer to the chart for assistance with how to process late changes: Pitt Worx late action charts
- If the transaction is late, please do not submit a request until it has been reviewed and approved in Pitt Worx.
- As a reminder, the I-9 needs to be updated in both I-9 Management and Pitt Worx. The I-9 can be viewed under Work Relationship in Pitt Worx.

Payroll Dates, Deadlines, and Register Review

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Functional Calendar

- Important payroll deadlines can be found on the Payroll Functional Calendar. This includes timecards, QuickPay (off-cycle) payrolls, retry requests, and other critical deadlines.

- To access the Functional Calendar published on our website, please visit the department calendars and resources page.

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Sample Functional Calendar

May 2024						
Sunday	**Monday**	**Tuesday**	**Wednesday**	**Thursday**	**Friday**	**Saturday**
			1. *Biweekly Day 2* 7:00 am preview biweekly payroll registers available 11:00 am deadline for dept admins to request biweekly retries	2. 7:00 am final biweekly payroll registers available 9:00 am deadline for depts to request QuickPays dated for 5/3/24 2:00 pm deadline for dept admins to request ACH reversal for 5/3/24 BW pay	3. **Biweekly Payday** **QuickPay paydate for Biweekly & Monthly**	4.
5.	6. 12:00 pm Pitt Worx timecard approval deadline for week ending 5/4/24	7.	8. 	9. 9:00 am deadline for depts to request QuickPays dated for 5/10/24	10. **QuickPay paydate for Biweekly & Monthly**	11.
12.	13. 12:00 pm Pitt Worx timecard approval deadline for week ending 5/11/24 12:00 pm biweekly deadline for retroactive changes including timecards 5:00 pm deadline for biweekly new hires/rehires to be completed which includes onboarding	14. *Biweekly Day 1* 1:00 pm biweekly Pitt Worx employee action changes approval deadline	15. *Biweekly Day 2* 7:00 am preview biweekly payroll registers available 11:00 am deadline for dept admins to request biweekly retries 12:00 pm UPP2 retroactive processing deadline for prior month pay changes 5:00 pm deadline for UPP2 new hires/rehires to be completed which includes onboarding and Pitt Worx employee action changes approval deadline	16. *UPP2 Day 1* 7:00 am final biweekly payroll registers available 9:00 am deadline for depts to request QuickPays dated for 5/17/24 2:00 pm deadline for dept admins to request ACH reversal for 5/17/24 BW pay	17. **Biweekly Payday** **QuickPay paydate for Biweekly & Monthly** *UPP2 Day 2* 7:00 am preview UPP2 payroll registers available 10:00 am UPP2 deadline for dept admin to request retries	18.
19.	20. 7:00 am final UPP2 payroll registers available 12:00 pm Pitt Worx timecard approval deadline for week ending 5/18/24	21. 	22. 12:00 pm monthly retroactive processing deadline for prior month pay changes 5:00 pm deadline for monthly new hires/rehires to be completed which includes onboarding	23. *Monthly Day 1* 9:00 am deadline for depts to request QuickPays dated for 5/24/24 1:00 pm monthly Pitt Worx employee action changes approval deadline, excludes new hires/rehires	24. **QuickPay paydate for Biweekly ONLY** *Monthly Day 2* 7:00 am preview monthly payroll registers available 12:00 pm biweekly deadline for retroactive changes including timecards 5:00 pm deadline for biweekly new hires/rehires to be completed which includes onboarding 6:00 pm deadline for dept admins to request monthly retries	25.
26.	27. **UNIVERSITY HOLIDAY – UNIVERSITY CLOSED**	28. *Biweekly Day 1* 12:00 pm Pitt Worx timecard approval deadline for week ending 5/25/24 1:00 pm biweekly Pitt Worx employee action changes approval deadline	29. *Biweekly Day 2* 7:00 am preview biweekly payroll registers available 7:00 am final monthly payroll registers available 11:00 am deadline for dept admins to request biweekly retries 2:00 pm monthly and UPP2 deadline for dept admins to request ACH reversal	30. 7:00 am final biweekly payroll registers available 9:00 am deadline for depts to request QuickPays dated for 5/31/24 2:00 pm deadline for dept admins to request ACH reversal for 5/31/24 BW pay	31. **Monthly Payday** **Biweekly Payday** **QuickPay paydate for Biweekly & Monthly**	

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Payroll Register Reports & Access

Register reports are available for Biweekly, Monthly, and UPP2 payrolls. The register reports are also available for any off-cycle payments that are processed. It is extremely important that each department review their payroll registers as soon as they are available every pay to ensure accuracy. It is also an audit requirement for each department to review their registers.

- To know when the online register reports are available for review, please visit our calendars and resources page on our website
- To gain access required to generate and view the online payroll registers, complete and submit the access form
- Detailed instructions for the register review process can be found in our register review procedure
- For information on the All-Temps register reports, please see our announcement and the All-Temps Register Quick Reference Guide
- For questions and retry requests, please submit an inquiry

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Pitt Worx Payroll Register

The Payroll Register Report lists employees by CDC and includes:

- Employee number
- Earnings (vacation and sick time will not be shown separately for exempt employees)
- Name
- Hours
- Current salary/rate
- Year to date amounts
- Net pay
- Check # or direct deposit (final register only) - employees receiving physical checks will have a number listed next to Check #

Additional resources on how to generate the Payroll Register Report through Pitt Worx are available on the Payroll website under the Department Administrator role at https://www.payroll.pitt.edu/da-pitt-worx-resources

Note: the CDC code is only where the employee appears on the register and the account distribution is based on TEAM or SPAR account information

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Before Payroll Register Review

- Run and review the expired/pending I-9 reports
- Run and review the timecard status report
- Ensure all Pitt Worx actions including timecards have been both submitted and approved in Pitt Worx prior to payroll deadlines
- Day 1 is the day that the payroll is processed. All Pitt Worx actions must be completed by the 1:00PM deadline on Day 1
- The deadline for retroactive changes is at 12:00PM the day before the payroll is processed

Payroll Register Review
Internal Audit Requirement

Payroll Register Review Requirements

- Verify each employee's payments:
  - Validate current gross/salary hours
  - Check for expected and unexpected salary changes
  - Ensure hourly employees have been paid correctly
  - Make sure any terminated employees or employees on a leave of absence receive the correct pay
- Once the register has been reviewed, it must be authorized by entering the following information in the upper right-hand corner of the first page:
  1. Signature of reviewer (Register Reviewed By)
  2. Date of review
  3. Indicate "Errors Resolved" or "No Errors" as applicable.
- Signed copies need to be saved for audit purposes for 3 years. This may be an electronic signed copy.

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Payroll Register Review – Day 2

- Day 2 is the day after the payroll has run when preview payroll registers are available for review
- On Day 2, the payroll team reviews the results of the payroll, resolves errors, and runs audit reports prior to finalizing the payroll.
- Payroll is able to process a **retry** to adjust the pay for an employee if all Pitt Worx actions have been approved
- Payroll is able to process a **delete** to remove an employee from the payroll
- Departments have until 11:00AM on Day 2 for the biweekly payroll and until 6:00PM for the monthly payroll to request retries or deletes by submitting an inquiry selecting "Payroll" for the Service Area and I need help with "Payroll Retry Request"
- If you know prior to payday that an employee should not be paid (terminations, contract changes, leave of absence) please notify us by submitting an inquiry as soon as possible. Payroll can stop a pay from processing to prevent an overpayment. Once a corrected action is submitted and approved, a new pay can be issued.

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Overpayments

All overpayments should be caught before or during preview register review. If it is missed during the review process, the employee has an obligation to let you know that they were overpaid immediately.

Please submit an inquiry as soon as you know of any overpayment situation by selecting "Payroll" as the Service Area and I need help with "Reversal/Over payment". Payroll will review the overpayment.

The best recommendation is to process a banking reversal to recoup the overpayment.

Alternate recoupment options include:

- Short pay – if a reversal is not possible and they are a current employee, this will autopay if there is enough gross
- Personal check repayment - only used if we cannot reverse or short pay

Please note: If a net overpayment check is not received within the same calendar year that the overpayment occurred, the employee will owe the gross wages in the subsequent year. When the employee receives and has use of those funds, the wages become reportable and taxable in that year. The wages must then be reported on the employee's W-2 Form for the year paid. If the repayment is $3,000 or less, the employee may be able to deduct it from income in the year in which it was repaid. If the repayment is over $3,000, the employee may be able to take a credit against the tax in the year in which it was repaid. Please refer to IRS Publication 525, Section Repayments, Page 34 for additional information.

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Reversal Requests

- A direct deposit **reversal** can occur up to five business days after payday. Notify us by selecting "Payroll" for the Service Area and I need help with "Reversal/Over Payment." During this time, the employee has access to the deposited funds. If any withdrawal against the funds is made, a reversal is not possible and other means of collection must be determined.

- It takes up to 3 business days to know if the reversal was successful and if we were able to recoup the payment

- The earlier a reversal request is submitted, the better possibility it will be successful. All reversals submitted after the initial reversal deadlines will not be recorded until the following month on your level reports since they occur after payroll has finalized.

  - 2:00PM initial reversal deadline two business days before Monthly payday
  - 10:00AM initial reversal deadline the day before Biweekly payday

- The best situation is to review and catch all overpayments during payroll preview register review.

Troubleshooting why an employee is paid incorrectly

There can be several reasons an employee did not receive the correct pay. Here are some ways to identify why the employee did not receive a pay or the pay was incorrect:

- Verify the I-9 is "verified" and not expired in I-9 Management and under the Work Relationship in Pitt Worx
  - If the I-9 is incomplete or expired, the employee will not process through the payroll.
- Verify the salary is updated
  - If the salary was not updated and approved in time for the payroll, this will result in a discrepancy in their pay.
- Verify the ICP is correct and approved
  - If the ICP has not been fully approved, it will not process through the payroll.
  - The ICP must have the correct end-date, which is always the last day of the pay period, in order to process through payroll correctly.
  - ICP payments are not prorated. The ICP payment will be for the exact amount entered in Pitt Worx.
- Verify the contract dates are correct
  - Incorrect contract end-dates for 4/4, 8/8, 9/9, and 10/10 can result in the employee not processing through the payroll correctly. Note: 12/12 employees will continue to run through the payroll regardless of the contract end-dates.

Troubleshooting why an employee is paid incorrectly *(continued)*

- Termination
  - Be sure employees are terminated timely to ensure no overpayments.
- Make sure timecards are submitted and approved timely
  - If timecards are submitted/approved late, let the employee know it will automatically be added to next pay.
- If new hire is not on the register, validate new hire is in Pitt Worx.
  - Employee appointments must be processed and approved in Pitt Worx before an employee's pay can be processed.
- If an employee is not appearing on the register and all their information in Pitt Worx has been verified, it could be one of the following two reasons:
  - CDC is wrong – verify that the CDC code is correct in Pitt Worx
  - Your access is not up to date to view all employees. Double check your Pitt Worx access form submission.

Off-cycle Payment Process

In the event an off-cycle payment is needed:

- Please submit a Service Request inquiry for all off-cycle payments here by selecting "Payroll" as the Service Area and I need help with "Payroll Service Request".
- **All applicable Pitt Worx actions must be approved prior to the request**. This may include correct contract dates, ICPs, updated I-9s, etc. This can all be viewed in Pitt Worx.
- A service fee of $75.00 will be charged to the requesting department for each off-cycle payment. This fee is due to the additional work and processing costs associated with off-cycle payments.
- An account number is always required. The subcode is always 8010. The purpose, sponsored project, and reference codes are always zeros.
- Off-cycle payments are distributed by direct deposit. In the rare instance that an individual does not have an active direct deposit account, a physical check may be generated and mailed to the employee's address. Department administrators will be notified when the QuickPay registers are available.

If an employee was not paid or underpaid, there may be an option to enter a pay adjustment into the next pay without a fee.

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Foreign Nationals

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Foreign National (Non-Immigrant) Payroll Processing

Payroll website as a resource – Select your Role, Pay & Taxes, Global Payroll & Foreign National Taxes

Under Foreign Nationals Working in the US, there is information on the following:

- Taxes by Tax Residency
- Social Security Numbers
- Tax Treaty Benefits
- Year End Information
- FAQs

Administrator Resources For Foreign Nationals Working in US:

- https://www.payroll.pitt.edu/foreign-nationals-working-us

Payroll is not able to complete tax forms or provide tax advice.

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Social Security Numbers

- Required for tax withholding and reporting purposes
- Recommended 10-day application waiting period
- Once Social Security Card is received it can be submitted to Payroll through our secure upload site

More information is available on the Social Security Administration's website.

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Tax Treaty Benefits

Reduce or eliminate federal tax obligation for a

- Benefit period and/or
- Annual dollar limit

For more information:

- Visit the tax treaty benefits page of the Payroll website
- IRS Treaty Information – Publication 901

Tax Analysis

Foreign National Information Form (FNIF)

- Current visa classification
- Visit purpose
- Intended length of stay
- Prior visits to the U.S. in certain classifications

NOTE: If the employee has not checked in with OIS as a new hire or when work authorization is updated, Payroll may need to reach out to departments for more information.

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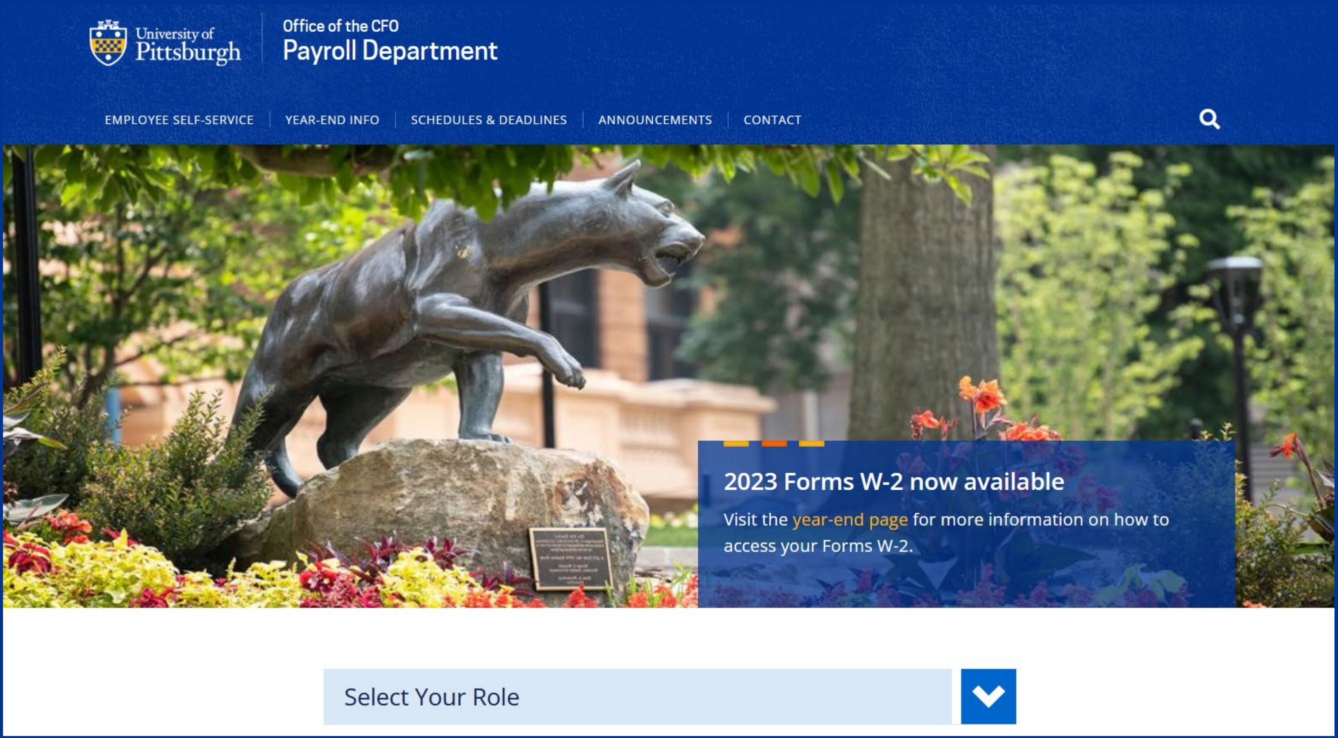
Visa Extensions

Form I-9 re-verifications are by appointment only with HR Shared Services. Appointments for the Form I-9 re-verification can be found using this link: https://pitthrss.as.me/schedule.php.

For assistance outside of the available appointment hours, please submit an inquiry to Customer Service Center.

Additional Resources and Closing Considerations

Payroll Website – www.payroll.pitt.edu



Payroll Department Secure Document Submission

- Employees may send confidential information through our secure upload site

- This can be used to submit confidential information, such as Social Security Cards
  - Employee name changes can be submitted by sending a copy of the Social Security card through this site
  - Corrections to Social Security Numbers can be submitted through this site

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FICA Tax Exemption

- FICA contains two parts: Social Security and Medicare. The tax rate for social security is 6.2% and the tax rate for Medicare is 1.45%. Student workers and students with academic appointments must have the credit load listed in the table to be eligible for the FICA tax exemption benefit.

Term	**Undergraduate Credit Load**		**Graduate Credit Load**	
	Part time	*Full Time*	*Part time*	*Full Time*
Fall/Spring Terms	6+	12+	4.5+	9+
Summer Terms	3+		3+	
Graduate Students working on dissertations must be registered as graduate student and PeopleSoft must be coded as dissertation student for person to be FICA exempt.				

- *Please note: Students must be registered for classes appropriately prior by payroll processing established deadlines in order for the FICA tax exemption benefit to be applied.*

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Accounting

Please feel free to share this information with your Department Accountants.

Level Reports

- The Level Report is generated and distributed from General Accounting in the Controller's Office.
- Information regarding Level Reports can be found here: **https://www.controller.pitt.edu/faq/**. For any additional assistance from General Accounting, please click on the "Contact General Accounting" box in the link.

SPARS (Salaried Personnel Activity Reports)

- Information on SPARS can be found here.
- To sign up for various workshops relating to SPARs please visit this page.

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Accounting (Continued)

Salary Wage Cost Transfers (SWCT)

- Salary Wage Cost Transfers may be needed when an incorrect account number is charged for the employee's wages. This is owned by Financial Record Services.
- Salary Wage Cost Transfer form can be found here
- General FAQs regarding the SPAR can be found here: **https://www.controller.pitt.edu/faq/spar-faq/**. For additional assistance, contact **SPARhelp@cfo.pitt.edu**

- For all other questions in relation to Financial Record Services, visit: **https://www.financialrecords.pitt.edu/**

Resources for Employees:

- The Payroll Department's website is a valuable resource that provides information on tax rates, forms, FAQs, due dates, and other pertinent payroll information.
  - To find taxation information, select your role, Pay & Taxes, and My Pay
- Information regarding benefits and benefits customer support can be found on the Benefits Department's website
  - Time off information can be found on the Time Off page on the benefits department website.
- Staff employees who are terminating employment (leaving the University) or transferring departments can ensure a smooth transition by referring to the staff separation checklist.
- Supervisors of staff employees that are terminating or transferring should refer to the separation checklist for supervisors.

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Self-Service Resources for Employees:

- The University pays employees via Direct Deposit. Employees can learn how to update or add their direct deposit in Pitt Worx using these direct deposit instructions.
- Active employees can update their address, Form W-4, and other tax forms online through Employee Self-Service in Pitt Worx using these instructions.
  - State and local taxation is based on the employee's address on file at the time the payroll is processed. Employees are responsible for ensuring their address on file is correct.
  - If an employee claims exempt on their Form W-4, they must resubmit a new Form W-4 each year to continue to be exempt from Federal Income Tax (FIT) withholding.
  - Employees may can use this net pay estimator to calculate their estimated tax withholdings, including an estimate of their federal income tax withholding based on their Form W-4 selections.
  - The Local Service Tax (LST) exemption form must be filled out annually via self-service for any employees who qualify as exempt from LST. It only needs to be submitted electronically. No additional steps are needed to claim the exemption.
- Active employees can opt-in to receive their Form W-2 electronically through Employee Self-Service in Pitt Worx. Terminated and inactive employees can also opt-in and access their Forms W-2 electronically directly through ADP.
  - Opt-in instructions can be found on our website.

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Electronic Form W-2:

- The University highly recommends every employee to opt-in to receive a paperless Form W-2 to support the University's sustainability goals by reducing printing.
- The paperless Form W-2 is mobile accessible which ensures greater convenience for employees.
- Employees can conveniently access duplicate copies of their Forms W-2 for up to 3 prior years back.

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Resources for Administrators:

- The Pitt Worx Resources Sharepoint site can be of great assistance when submitting Pitt Worx action changes. It provides navigation instructions, reference guides, contains a glossary and more.
- Inquiries can be submitted to our Customer Service Center here: https://www.hr.pitt.edu/contact-ohr
    - **NOTE:** Employees with questions should contact their supervisor or department administrator first to discuss any pay issues. If further assistance is needed, the department administrator can submit an inquiry on through the Customer Service Center on the employee's behalf.
- Each Dean's office has different procedures, so please check with your area and inquire about the requirements. (ie: signature hierarchy)
- OHR offers workshops on University Business, Human Resources, and Financial Services for administrators and supervisors through the Faculty and Staff Development Program (FSDP)
- Financial Records Services assists University departments with journal entries, document pulls, opening account numbers in the PantherExpress System, Salary Wage Cost Transfers (SWCT). More information can be found here.
- Information regarding Internal Revenue Section 409A limits can be found here.

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Closing Considerations & Additional Resources:

- It is important to follow the proper steps in the Payroll process to:
  - Ensure a timely and accurate payroll
  - Be in compliance if audited
- Internal controls must be adhered to by the Payroll Department and by departments performing payroll functions to ensure University compliance with federal, state and local regulations.
- For payments to third party contractors or suppliers, and payments that are submitted through Concur, information can be found on the Purchase, Pay & Travel website.
  - Individuals who receive payments processed through Concur should be informed before the payment is submitted for them and should be provided the link to contact Payment Processing if they have any questions.

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Contact Payroll

We are here to assist you in any way we can. As part of our ongoing objective to provide a timely and accurate payroll as well as provide excellent customer service, all departments within the University community should submit payroll inquiries through the Customer Service Center.

Please let us know when there is a new department personnel with payroll responsibility so we can send this presentation and add them to our contacts list by selecting “Payroll” and I need help with “New Department Administrator”.

Employees with questions should contact their supervisor or department administrator first to discuss any pay issues. If further assistance is needed, the department administrator can submit an inquiry on through the Customer Service Center on the employee’s behalf.

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