Northwestern | OFFICE OF HUMAN RESOURCES

May 2024 Human Resources Operations, Payroll and Tax Updates

Colleagues,

We hope you find the information below helpful as we near the summer and fall hiring seasons.

For further assistance on any item below, please contact askHR@northwestern.edu.

Human Resources Operations, Payroll, Tax and Support

Selected upcoming deadlines

Friday, May 24, 5 pm - Memorial Day – Employees should approve their timecards by 5 pm Friday. Employees scheduled to work on Saturday should approve their timecards at the completion of their scheduled Saturday work period. Supervisors should review and approve employee timecards by 1pm Sunday, May 26.

Wednesday, June 12, 5 pm – Forms for bi-weekly payroll due early for Juneteenth holiday

Monday August 5, 5 pm **-** Deadline for 9/1 new faculty hire paperwork (and August summer salary and monthly forms)

Wednesday, August 14 – Salary Planning load. See details in next section.

Wednesday, September 11 – Graduate Student Interface load (PhD awards load from SES to myHR)

Summer salary requests follow the *monthly* appointment form cutoffs (generally the 5th of each month).

>> View payroll deadlines on the monthly Payroll Calendars

>> View bi-weekly and monthly pay and cutoff dates

9/1 paid appointment processing held until August 14th salary planning import

New hires, rehires, hire/adds, unpaid appointments and terminations for September 1st may be submitted and processed now.

However: paid reappointments and salary adjustments that occur on September 1st or later, even if submitted now, must be held for processing until after the salary load on Wednesday, August 14th.

- Why? myHR requires the 9/1 salary load rows to be placed on jobs (as sequence 0) before any other 9/1 or later changes.

When is I-9 required? Look at the chartstring's account code

I-9 completion is no longer required when receiving payments *only* on scholarship account codes 78050, 78010, 78020 or any other code beginning with 7xxxx. (Foreign nationals *do* need to complete FNIS for scholarships, however.)

I-9s are needed, however, as soon as wage payments start – account codes beginning with 6xxxx (e.g., TA, RA, GA). Department administrators should review I-9s before submitting payment requests and notify employees and students if I-9 is required.

- Section 1 of the I-9 *must* be completed by the employee's first day.
- Section 2 of the I-9 *must* be completed by end of 4th day of employment. (ex: If employee starts on Monday, Section 2 must be completed by end of day on Thursday)

>> Review I-9 status via I-9 Service Center before submitting payments

>> Information to share with employees and students re: I-9

State taxes

Moved to, or preparing to move to, Illinois? Leaving Illinois?

Initial myHR setup of state taxes is determined by the address on the Personal Data form submitted **at hire**. This state tax setup does **not** change automatically with an address update in myHR (for instance, when an employee updates their address from Iowa to Illinois after hire). Instructions on how to fix/modify taxation are available at the link below; thank you for sharing this with employees who may be relocating.

>> View more information online regarding address and state taxation

Temp hiring

Work-study: On Saturday, **June 8, 2024** work-study allotments end. Please either terminate student work-study positions as of Sunday, June 9, or transfer them to a student temp job using the Manage Temp Job panel in myHR.

Temp work over the summer: Student temps who will register again as students in fall quarter may remain as student temps over summer, while students who leave NU or graduate must be rehired as non-students.

Graduating students: However, students leaving/graduating NU must have their student jobs terminated, paperwork submitted to rehire as a *non-student* temp, and a background check completed. The move from student to non-student cannot be processed via the Temp Panel.

Additional record being added? Changing an existing record? Please use the request's Comment box to clarify for HR Operations whether you are adding a new record or making changes to an existing one.

>> Find detailed instructions in the Managing Temporary Employees guide

Are any appointments expiring? Check query and submit rehires one month ahead

If a delay in reappointment, or an expired NetID, would disrupt your unit's or employee's work, please submit all reappointment paperwork the month before the expiration date (for example, rehire paperwork should be submitted in June for appointments ending on July 31).

The following myHR query provides a list of expiring appointments. Appointments on the list will terminate automatically via the monthly termination process.

>> myHR > Workforce Administrator > Reports > Position Management > NWPOS001 Expiring Appointments

Foreign national hiring

Please remember that foreign nationals must complete FNIS to receive any pay, whether wages or scholarships, and they cannot be paid until FNIS is completed because we don't know how to set up their taxes without the information gathering during FNIS processing.

Though not required for scholarships, completing I-9 at the same time as FNIS is recommended, as the I-9 requires many of the same documents and will save the employee or student a future visit to AskHR.

>> See Onboarding Nonresident Students & Employees

>> See Social Security and Tax Identification Numbers

When are late paperwork and payments processed?

A payroll is considered closed once the "confirm" is run – at that point all pay and deductions have been calculated and payments created. Once the payroll has confirmed, a payment cannot be stopped or modified - no changes can be made to it - except on a future adjustment payroll.

>> View payroll deadlines on the monthly Payroll Calendars

>> View bi-weekly and monthly pay and cutoff dates

Any paperwork submitted for a pay period that has already confirmed is known as a "retro." Unless requested otherwise – and a chartstring provided – retro payments always go onto an employee's next regular payroll (e.g., a retro for June would go onto July pay for a monthly employee or student).

- If you require the retro payment earlier, a $100 fee will be assessed to place the payment on an earlier pay date or create a paper check. Paper checks are created only on Tuesdays and Fridays.

When will my HR Operations request be processed?

From June to early November the University experiences a high season for hiring all types of positions. Documents submitted to HR Operations are expected to be processed in 10 business days, with turnaround exceeding 10 business days during certain weeks in late September and October.

Need your request's status? Please a) wait 8-10 business days from submission and b) confirm the request is not on Manage Job in myHR > Navigator > Job Data before reaching out for request status. If 8-10 business days have passed since submission, **and** the change is not on Job Data, email Julie Phelan, HR Operations Manager for review.

Requests to expedite processing: We are often asked to move a request up in the queue, and unfortunately cannot do so except in rare circumstances, e.g. loss of insurance. Please email all requests for urgent processing directly to Julie Phelan.

I submitted my request late! We generally enter in the order received, in conjunction with where we are in the payroll cycle (e.g., we focus on bi-weekly before a bi-weekly confirm and monthly before a monthly confirm). Once all requests that were submitted on time are entered, we will work on those that came in late. There is no fee or rush request for these; there isn't a guarantee that your late submission will be entered, but in the majority of cases they do get in on time.

>> Further details: When Will My Request Be Processed?

Submitting requests to HR Operations for processing

Departments ***must*** verify the following information before uploading documents to HR Operations – it is the department's responsibility, not HR Operations', to find and fix the following issues before submission. Incomplete/inaccurate submissions will be rejected, must be re-uploaded after correction, and return to the end of the processing queue.

Once the department has verified the information below and submitted the request, the HR Operations team will complete more complex review to ensure the request is appropriate for the employee and valid per Northwestern position management standards (FASIS manual).

Departments, please complete the following before uploading a request:

1. *Review I-9:* All payments on wage account codes (6xxxx) require an active I-9.

2. *Include personal data forms:* New hires and those inactive for 6+ months need a personal data form. Do not send forms to askHR, or ask employees to take forms to askHR.

- Required fields: Legal name, EmplID or SSN (SSN required for new hires), date of birth, marital status, citizenship, address, local address
    i. If no local address, employee should provide other U.S. or foreign address and update myHR as soon as possible.
- No SSN? If wages will be paid (account codes starting with 6xxxx), employee must supply – and department must upload - the receipt received from the Social Security Administration when the SSN was applied for.

3. *Confirm EmplID: Does the hire have an existing and correct EmplID?* Departments should visit Northwestern Job Summary in myHR and use SSN or Date of Birth plus part of name – we suggest first initial of first name – to locate an existing ID or confirm that an ID belongs to the person for whom it was provided. Northwestern Job Summary will show all employees, regardless of your department security. Duplicate IDs are bad.
4. *Don't and do accept tax forms*
    - *Federal W-4* forms should ***not*** be requested from new hires (except for Special Pay). Employees and students complete their form directly in myHR Self Service.
    - *State W-4 or other tax* forms, for those states in which Northwestern collects taxes, may be accepted. Handwritten signatures – not typed – are required (electronic/stylus or paper/scan).
    - *Foreign National tax* forms: Foreign nationals work with the Foreign National Team to complete their tax forms during the FNIS process.
5. *Make sure chartstrings are open for the required time period* at myHR's View Valid Chartstrings panel
6. *Provide the supervisor's *correct* position number*
7. *If work-study, has a student been offered, and accepted, their award?*
    - Hiring Forms: Work-Study Program
8. *Do not send DCFS forms*: Attestations are entered into myHR by the employee or department, and the forms retained by the department.