



HR Liaisons Network Meeting Agenda

DATE: November 7, 2019

ATTENDING: HR Liaisons and HR Staff

Topic	Speaker
I. Welcome & Announcements <ul style="list-style-type: none">a. Staff Updates<ul style="list-style-type: none">i. HR Strategic Initiatives Specialist – David Hallii. Payroll Specialist – recruitmentiii. Julie Lin replacementb. Onboarding Center update	Karla McCormick
II. HRL Updates <ul style="list-style-type: none">a. HRL Updates<ul style="list-style-type: none">i. Next meeting – currently scheduled December 12, 2019 NOTE DATE CHANGEii. Sr Mgr, HR – Liberal Arts – selection in processiii. HR Generalist - Athleticsb. HRL Resources Advisory Council<ul style="list-style-type: none">i. Meeting – October 28, 2019<ul style="list-style-type: none">1. TES Policy Review2. Project Update3. ATS Workflow (upgrade of system)4. Community Service Leave - update5. Appointments to HRL Advisory Councilii. Next meeting – TBD<ul style="list-style-type: none">1. Topics - TBD	Leanne Fuller
III. Departmental Onboarding <ul style="list-style-type: none">a. ACESb. Student Affairsc. Agricultured. Forestry and Wildlife Sciences	Kim Rogers Trey Lightner Amanda Smitherman Sue Robinson
IV. Human Resource Development <ul style="list-style-type: none">a. Instructional Designer – Moriah Kentb. Performance Review – Mid-Year Check-in reminderc. 2020 NEO Scheduled. Spring Course announcement	Bill Shannon
V. Records <ul style="list-style-type: none">a. Termination EPAF illustration	Brittany Saliba
VI. Benefits Update <ul style="list-style-type: none">a. Open Enrollment<ul style="list-style-type: none">i. Benefits Fair – November 14ii. Communication Materials for Use – sent October 28, 2019	Teresa Coker
VII. Payroll <ul style="list-style-type: none">a. W-4 formb. Year-end Reminders	Ashley Fetner
VIII. Compensation & Classification <ul style="list-style-type: none">a. Project Updateb. FLSA – Open Forum communicationsc. NBAPOSN – Banner data information	Bailey Ward Shelly Murray
IX. Employment Services	Chris Thompson

a. ATS Upgrade Update	
X. Q & A	

HR Liaisons Network Meeting Minutes

November 7, 2019 – 2:45 p.m. – Auburn University Administrative Complex

Welcome and Announcements (Leanne Fuller)

- **Staff Updates:**

- Fuller welcomed HR Liaison Network members and said that a new HR phone directory was included in the meeting packet. It will also be shared electronically.
- Fuller reminded Liaisons that PAF illustrations are included on the HR Liaison Network website.
- David Hall, Specialist, Strategic Initiatives, was introduced. He started work on Oct. 14 and is already involved in multiple projects, including the PeopleAdmin upgrade and the 127 plan.
- A Payroll Specialist opening has been posted on the AU employment website. Sharon Reynolds will be leaving AU Human Resources at the beginning of December for another opportunity.
- Julie Lin, Admin Support Specialist, will retire at the end of this year, and her position will soon be posted on the employment website. The person who will take over her position will support several HR units, including, but not limited to, Compensation, Employment, and Campus Relations.
- Construction of the onboarding center is nearing completion. Fuller said she was scheduled to tour the facility during the week of Nov. 11. Once the facility is completed, computer equipment and ID card services will still need to be installed and/or moved to the new facility. Interviews are still occurring for onboarding center positions, including manager. Presentations for the manager finalists were scheduled to begin the week of Nov. 11.

- **HR Liaison Updates:**

- The next HR Liaison meeting will be rescheduled to Dec. 12, and will include a holiday cookie swap. Liaisons are encouraged to participate. Additional information will be forthcoming.
- An offer is expected soon for the Senior Manager, Liberal Arts. The candidate will replace Lori Bush, who is retiring at the end of this year.
- Athletics is seeking applicants for an HR Generalist position.
- The HR Liaison Advisory Board met on Oct. 28 and discussed the TES policy, Community Service Leave, the Mercer study, and other topics. Tammy Walker will replace Bush on the Board.
- The next Advisory Board meeting will likely be held the first week of December. Additional information will be forthcoming.

Departmental Onboarding Discussions (Kim Rogers, Trey Lightner, Denise Smith, Sue Robinson)

- ACES, Student Affairs, Agriculture, and Forestry & Wildlife Sciences briefly shared information regarding their respective areas for onboarding activities/events related to new employees. There were examples of agendas, website illustrations and discussions regarding the structure of events. Liaisons were encouraged to think about their areas, and where new onboarding activities unique to their divisions would be beneficial. More dialogue will be coming with the onboarding center, and where these activities can be coordinated for a great experience for new employees. Referenced examples are provided in the packets and electronic copies will also be shared with the minutes.

Human Resource Development (Bill Shannon and Kim Graham)

- **Instructional Designer:** Shannon introduced Moriah Kent, the new Instructional Designer in HRD. She will work with Kim and others to create more online courses.
- **New Quick Dive:** Shannon shared that there is a new Quick Dive called “Telephone Interview Guide”.
- **New course:** “Getting Started with Continuous Improvement” – there are two models taught in the course. Shannon indicated that he visit individual units and deliver the course. HRLs were asked to let him know.
- Shannon reminded HRLs that the Performance Year check-in Quick Dive is available. He also referenced a one-pager on the topic is available in the packet.
- Supervisor Pathways courses will be available in the spring, and will be available to current or aspiring supervisors.
- The New Employee Orientation (NEO) dates for 2020 have been established and are available in the packet.
- The Schedule for spring semester is being finalized and will be finalized soon.

Benefits Update (Teresa Coker)

- **Open Enrollment:** Coker shared highlights of the benefit plan changes for the employees.
 - Open enrollment period: November 1 – December 2, 2019
 - Coker reminded HRLs that AU has a self-insured plan and to be able to maintain a good plan, there are necessary premium increases.
 - Refer to the PowerPoint slides for specific information regarding the benefit plan changes.
 - Coker announced that work has started on development of a high deductible health plan that will be offered to employees for year 2021. A high deductible health plan is coupled with a health savings account (HAS), but not a flexible spending account.
 - The Benefits Fair is November 14th, 7am – 5pm, in the Coliseum. Postcards are coming soon through campus mail.
 - Coker shared that there will be a dependent audit in 2020 – more information will be shared on when it is expected. Copies of required documentation will be needed and will be able to securely upload information.
- **Communication Tools:** Patrick Johnston demonstrated the information/tools that are available on the website; he asked the HRLs to let him know if they are using/sharing the digital signage or posters.

Records (Leanne Fuller)

- **EPAF illustration: Terminating a Job (TERMJB)**
 - Fuller shared on behalf of Brittany Saliba that we were continuing with the series of termination EPAF illustrations as a resource for HRLs and department administrative employees who complete EPAFs.
 - The illustration is available in the packet and will be available on the HRL Resource Network.

Payroll Updates (Ashley Fetner)

- **NEW – W-4 tax form** (Federal tax form): Fetner shared with the HRLs that there is an upcoming change in the Federal tax form (W4) effective January 1, 2020. She advised that any employees completing the W4 form in 2019 with a 2020 hire date will complete the 2019 form but any changes after January 1 will have to be completed on the new 2020 form.
- Fetner reminded HRLs that the electronic W-2 is available for employees to opt-in for receiving the W-2 electronically. Benefits to the employee are earlier access, secure access, can access from anywhere and printing can be done from the electronic version. Furthermore, there will be a station at the benefits fair for opting in.
- There is a tax estimator on IRS.gov site as a resource.
- Working on a quick Dive video and should have more information available.

- Emergency contact Information – Fetner encouraged HRLs to remind employees about updating their emergency contact information.
- Fetner reminded HRLs of the payroll ePAF deadlines for year end. They dates are available on the website and 2020 dates have been updated.

Compensation and Classification (Rod Kelly, Shelly Murray, Bailey Ward)

- **Project Update:**
 - Kelly shared that the project continues and they are working closely with Mercer. There will be more information coming in the next several weeks as it progresses. HRLs will be provided training and information as the groups are initiated.
 - Bailey Ward shared some information regarding the architecture of the jobs and career streams and levels.
- Julie Lin is retiring. Compensation team is working on reviewing the procedures that Julie is handling now and will work with the HRLs on the necessary changes that are needed. More information to come.
- **NBAPOSN data collection:**
 - Shelly Murray spoke with the HRLs regarding the continued challenge of supervisor updates on the NBAPOSN screen. Murray shared that they have been working with ISS and an Ellucian consultant for best practice on recording and delegated authority.
 - Shelly shared that they are currently working to identify where things touch NBAJOBS and NBAPOSN supervisor fields. This information is important so that no changes are made without knowing the impact so that discussion can take place.
- **FLSA Update:**
 - Communication is being sent tomorrow on open sessions for employees, supervisors, and/or HRLs to attend.

Employment Services (Chris Thompson)

- **ATS Workflows & PeopleAdmin**
 - Thompson shared that the ATS site is being built and will expect changes as they work through the workflows, acceptance testing, and talking with each of you. The goal will be to have more automated efficiencies such as, electronic offer letters.
 - Thompson shared that they are working on an aggressive timeline but will work with each of the HRLs as he and his team work through the system.
 - Thompson assured HRLs that extensive in-person training and on-demand training will be available and they will come out to do training as much as is needed to help the hiring coordinators, supervisors, and HRLs.
 - Information sessions are planned for November and a communication will be sent soon announcing the dates.
 - The Employment Team will be consulting with each of the HRLs on their current postings to discuss the transition to the new system. Decisions will need to be made on closing the current postings by certain dates before the new system is live.
 - More information to follow.

Final Comments and Closing (Leanne Fuller)

- Fuller reminded the group of the “cookie swap/share” for next month’s HRL meeting.
- No further questions from the group; meeting was adjourned.



90 Day Employee Onboarding Checklist

Name _____

Position _____

Department/Home County _____

Start Date _____

Welcome aboard and we are so excited to have you on our team! This checklist is intended to be self-paced however, please work with your supervisor and/or mentor(s) to complete within your initial 90 days.

Administrative Items

- | | |
|--|--|
| <input type="checkbox"/> Payroll | <input type="checkbox"/> Directory Photo |
| <input type="checkbox"/> Benefits | <input type="checkbox"/> Business Cards |
| <input type="checkbox"/> Auburn University Identification Card
On Campus / Off Campus | <input type="checkbox"/> Staples Account (if applicable) / Departmental Ordering Process |
| <input type="checkbox"/> Keys/Swipe card access for building and office | <input type="checkbox"/> Verify Security Access for Finance & HR Systems (if applicable) |
| <input type="checkbox"/> Purchasing Card Authority | <input type="checkbox"/> Review Travel Vouchers |
| <input type="checkbox"/> ACES Travel Itinerary | <input type="checkbox"/> Review ACES P Card Process |
| <input type="checkbox"/> Travel Voucher FAQ | Directions for Using P Card |
| <input type="checkbox"/> Visa Reconciliation Form | Purchasing Card |

Required Training

- ☐ [AU Risk Management Courses](#)
 - Fleet Safety
 - Prevent Discrimination & Harassment Together
 - Protecting Children: Identifying & Reporting Misconduct
- ☐ Civil Rights – Dr. Paul Waddy/Chris McClendon
- ☐ [SANS Security Training](#)

Resources

- ☐ [ACES.edu](#)
 - [Staff Directory](#)
 - [ACES Policy Manual](#)
 - [Extension Mission & Philosophy](#)
 - [ACES Organization & Structure](#)
 - [Base Program Areas](#)
 - [Intranet](#)
- ☐ [Auburn.edu](#)
 - [AU Access](#)
 - [HRD Courses](#)

Review Job Description and Expectations

- | | |
|---|---|
| <input type="checkbox"/> Discuss Job Description | <input type="checkbox"/> Discuss Organizational Expectations |
| <input type="checkbox"/> Probationary Period <ul style="list-style-type: none">▪ Administrative Professional & University Staff▪ Non Tenure Track Faculty- CEC, REA, Specialist | <input type="checkbox"/> Discuss Personal Professionalism |
| <input type="checkbox"/> Performance Management/Planning Document <ul style="list-style-type: none">▪ Administrative Professional & University Staff▪ Non Tenure Track Faculty- CEC, REA, Specialist | <input type="checkbox"/> Discuss Professional Development Opportunities & Professional Associations |

Communications & Marketing

- | | |
|--|---|
| <input type="checkbox"/> Start Up Request | <input type="checkbox"/> Social Media Policy |
| <input type="checkbox"/> Brand Guidelines | <input type="checkbox"/> Educational & Promotional Products |
| <input type="checkbox"/> Digital Strategy | <input type="checkbox"/> Business Cards |
| <input type="checkbox"/> Information Standards | <input type="checkbox"/> Name Tags |

- ☐ [Media Release](#)
- ☐ [Printing Budget](#)
- ☐ [Rapid Print](#)

- ☐ [Shoot & Edit Like A Pro](#) *(Optional)*
- ☐ [Templates](#) & [Logos](#)

Using Technology	Funding Opportunities
<input type="checkbox"/> Web Development	<input type="checkbox"/> Grants & Contracts (AU)
<input type="checkbox"/> Program Delivery Resources (Zoom Training)	<input type="checkbox"/> Grants and Contracts (AAMU)
<input type="checkbox"/> Qualtrics Survey Tool	<input type="checkbox"/> ACES Grant Training
<input type="checkbox"/> Vol 17	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>

Additional Policy Reviews	Civil Rights
<input type="checkbox"/> Review Volunteer Policy Page 78	<input type="checkbox"/> Policy
<input type="checkbox"/> Minor Policy	<input type="checkbox"/> Requirements & Complaints
<input type="checkbox"/> Youth Overnight	<input type="checkbox"/> Form
<input type="checkbox"/> ACES Overnight Reviewer Check List	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>

Supervisor Signature: _____ Date: _____

Employee Signature: _____ Date: _____

Your direct supervisor will send a copy to Chris McClendon, ACES HR Director, to file in your personnel file.

If there are any concerns in regards to the document, please contact ACES HR for more information.



Foundations Training

CASIC Building
August 8-9, 2019

Thursday, August 8

- 10:00 Welcome and introductions *Gary Lemme*
- 10:20 Unwavering Commitment to Alabama *Allen Malone*
- 10:30 What it means to serve as a regional agent, coordinator, or specialist *Paul Brown & Celvia Stovall*
- 11:45 Organizational Expectations *Celvia Stoval & Paul Brown*
- 12:15 Lunch
- 1:15 Your Role with compliance, ethics, & risk at AU *Kevin Robinson*
- 2:15 Break
- 2:30 You are the Brand & Navigating ACES online resources *Emery Tschetter & Jonathan Davis*
- 3:30 Building a Service Culture *Bill Shannon*
- 4:45 Adjourn

Friday, August 9

- 8:00 Preparing for Performance Success *Human Resources*
- 8:45 ACES Jeopardy
- 9:45 Break
- 10:00 Evaluation & Reporting *Ayanava Majumdar*
- 11:00 Inclusion in our workplace and in our programs *Cindy Canfield and Chris McClendon*
- 11:45 Wrap-up
- 12:00 Adjourn



School of Forestry & Wildlife Sciences

A U B U R N U N I V E R S I T Y

New Faculty – Administrative/Staff Orientation

Agenda

August 19, 2019

2:00 – 3:45

Dixon Conference Room

2:00	Welcome (Sue Robinson and Paula Davis)
2:00 – 2:15	Development (Heather Crozier, Sharon Tatum)
2:15 – 2:30	Student Services (Scott Enebak, Jodie Kenney, Wendy Franklin, Lisa Hollans)
2:30 – 2:45	SFWS IT (James Fukai, Andrew Thornton, Katherine Schwarzauer)
2:45 – 3:00	Graduate Student Support (Graeme Lockaby, Audrey Grindle)
3:00 – 3:15	Communications & Marketing (Jamie Anderson)
3:15 – 3:30	Financial Services (Paula Davis, Jason Hare, Suanne Gilbert, Kim Ward)
3:30 – 3:45	Building Services (Michelle Straw) and Land Management (Russell Miller)

Planned Check-in Phase of Performance Management



The Planned Check-in Phase is a time for Supervisors and Employees to assess progress.



The Fall and Winter months mark the Planned Check-in portion of the Performance Management Process at Auburn University. This is a time for Supervisors and Employees to assess progress. These Check-in's are important because they give the supervisor and the employee a chance to see how well the employee is meeting the duties, goals, and development needs set during the Planning phase and to make adjustments to goals, assess problematic areas, or update the Performance Review Form if there has been a shift in priorities.

The Planned Check-in usually takes place approximately six months after the completion of the Planning phase and is often called a Mid-Year Review, however, Planned Check-in's can be arranged through mutual agreement when feedback is needed or accomplishments are met and not just at the six-month mark. Some departments at Auburn touch base quarterly with their employees.

Best Practices:

The Planned Check-in Phase along with the rest of the Performance Management process is discussed in our online courses, MG500e: Introduction to Performance Management and MG510e: Performance Management Fundamentals for Supervisors.

BEFORE THE MEETING:

Spend time planning

- Planned Check-in sessions should occur during between October 1 and December 15.
- Spend ample time to plan before the Planned Check-in meeting occurs.
- Review each employee's Performance Review Form that was saved from the Planning meeting.
- Send an Outlook calendar request to each direct report for separate one-on-one meetings and allow for uninterrupted time.

DURING THE MEETING:

Set the tone

- Set a comfortable and friendly tone.
- Remind your employee about what was planned in the previous Planning meeting.

<p>Review Expectations:</p>	<ul style="list-style-type: none"> • Review job duties, position goals, and development needs. • Commend successes and performance efforts. Praise your employee when progress has been made toward goals, duties, goals, or development. • Hold the employee accountable. Discuss the reasons why progress may not be occurring. <ul style="list-style-type: none"> • It might be a good idea to re-direct performance efforts if there are duties, goals, or developmental areas that have had no progress. • Adjustments may need to be made so that improvement can happen. • Make adjustments to the form by adding the date and changes to existing duties, goals, or development plans to the Performance Review Form as needed. • It is also okay to add new duties, goals, or development plans to the Performance Review Form.
<p>Consider Development:</p>	<ul style="list-style-type: none"> • Consider development and career potential. • Date and add completed classes to the Performance Review Form. • You can also date and add new recommendations to the Performance Review Form.
<p>Discuss Observed Behaviors:</p>	<p>Job duties and responsibilities are important in establishing performance expectations and reviews. But it's not just about meeting the expectations of a job. It's about how the job is performed. Behaviors matter.</p> <ul style="list-style-type: none"> • Have a focused conversation about the specific behaviors that will assist the employee to achieve the desired outcomes. <ul style="list-style-type: none"> • Utilize the Observed Behaviors website to aid in the conversation. The website can be found by going to aub.ie/observedbehaviors. Here you will find 31 behaviors listed with definitions and varying performance level examples that can be copied and pasted directly into the Performance Review Form.
<p>AFTER THE MEETING AND THROUGHOUT THE YEAR:</p>	
<p>Coaching & Feedback:</p>	<ul style="list-style-type: none"> • Save the Performance Review Form with the updated check-in information and send a copy to the employee. • Don't forget that Coaching and Feedback occurs throughout the year. <ul style="list-style-type: none"> • Effective and timely feedback is a critical component of a successful performance management process. • Frequent feedback provides clarity and eliminates surprises. Employees should not be caught unaware when they sit down for their Planned Check-in in a few months time. Employees need to know where they stand. • Offer clear feedback in a timely manner on how they're doing, what's working, and what's not.

For more information, contact us at autrain@auburn.edu or at aub.ie/performance.



AUBURN UNIVERSITY
HUMAN RESOURCES

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Caution: *DRAFT—NOT FOR FILING*

This is the second early release draft of the 2020 IRS Form W-4, which the IRS is providing now so that programming of payroll systems can begin. The title of Form W-4 has been changed to Employee's Withholding Certificate (removing the word "Allowance").

Note that in this second early release draft of Form W-4, the computation of withholding has not changed from the first early release posting. The next early release of Publication 15-T is scheduled for the middle of August and will expand on the first draft including separate computations for figuring withholding for employees who file a 2020 Form W-4 in 2020 and for a 2019 or earlier Form W-4.

Although the final Form W-4 will not be posted for a few months, there will be no further substantive changes. One of the primary reasons the IRS is releasing the drafts is so that this draft and the forthcoming draft Pub. 15-T can be used for programming payroll systems now.

See [IRS.gov/W4](https://www.irs.gov/W4) for information on the Form W-4, and [IRS.gov/Pub 15-T](https://www.irs.gov/pub/15-T) for the latest information on the employer instructions.

Draft forms generally are subject to OMB approval before they can be officially released. Early release drafts are at [IRS.gov/DraftForms](https://www.irs.gov/DraftForms), and may remain there even after the final release is posted at [IRS.gov/LatestForms](https://www.irs.gov/LatestForms). We plan to issue the final revision of the 2020 Form W-4 and Publication 15-T in late Fall. If you have comments on this draft, you can submit them to WI.W4.Comments@IRS.gov by September 9, 2019. We can't respond to all comments due to the high volume we receive.

Employee's Withholding Certificate**2020**

- ▶ **Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay.**
 ▶ **Give Form W-4 to your employer.**
 ▶ **Your withholding is subject to review by the IRS.**

Step 1:**Enter
Personal
Information**

(a) First name and middle initial	Last name	(b) Social security number
Address		▶ Does your name match the name on your social security card? If not, to ensure you get credit for your earnings, contact SSA at 800-772-1213 or go to www.ssa.gov .
City or town, state, and ZIP code		
(c) <input type="checkbox"/> Single or Married filing separately <input type="checkbox"/> Married filing jointly (or Qualifying widow(er)) <input type="checkbox"/> Head of household (Check only if you're unmarried and pay more than half the costs of keeping up a home for yourself and a qualifying individual.)		

Complete Steps 2 through 4 ONLY if they apply to you. To see if you are exempt from withholding or if you have concerns about your privacy, see page 2. Everyone must complete Step 5. See instructions on page 2.

Step 2:**Multiple Jobs
or Spouse
Works**

Complete this step if you (1) hold more than one job at a time, or (2) are married filing jointly and your spouse also works. The correct amount of withholding depends on income earned from all of these jobs.

Do **only one** of the following.

- (a) Use the estimator at www.irs.gov/W4App for most accurate withholding; **or**
 (b) Use the Multiple Jobs Worksheet on page 3 and enter the result in Step 4(c) below for roughly accurate withholding; **or**
 (c) If there are only two jobs total, you may check this box. Do the same on Form W-4 for the other job. This option is accurate for jobs with similar pay; otherwise, more tax than necessary may be withheld ▶ ☐

CAUTION: If you have privacy concerns, choose (a) or (b). If you and/or your spouse have income from self-employment, including as an independent contractor, choose (a).

Complete Steps 3 through 4(b) on Form W-4 for only one of these jobs. Leave those steps blank for the other jobs. (Your withholding will be most accurate if you complete Steps 3 through 4(b) on the Form W-4 for the highest paying job.)

Step 3:**Claim
Dependents**

If your income will be \$200,000 or less (\$400,000 or less if married filing jointly):

Multiply the number of qualifying children under age 17 by \$2,000 ▶ \$ _____

Multiply the number of other dependents by \$500 ▶ \$ _____

Add the amounts above and enter the total here **3** \$ _____

Step 4**(optional):****Other
Adjustments**

(a) **Other income.** If you want tax withheld for other income you expect this year that won't have withholding, enter the amount of other income here. This may include interest, dividends, and retirement income. You should not include income from any jobs . . . **4(a)** \$ _____

(b) **Deductions.** If you expect to claim deductions other than the standard deduction and want to reduce your withholding, use the Deductions Worksheet on page 3 and enter the result here **4(b)** \$ _____

(c) **Extra withholding.** Enter any additional tax you want withheld each **pay period** . **4(c)** \$ _____

Step 5:**Sign
Here**

Under penalties of perjury, I declare that this certificate, to the best of my knowledge and belief, is true, correct, and complete.

▶ **Employee's signature** (This form is not valid unless you sign it.)

▶ **Date**

**Employers
Only**

Employer's name and address

First date of
employment

Employer identification
number (EIN)

General Instructions

Future Developments

For the latest information about developments related to Form W-4, such as legislation enacted after it was published, go to www.irs.gov/FormW4.

Purpose of Form

Complete this withholding allowance certificate so that your employer can withhold the correct federal income tax from your pay. If too little is withheld, generally you will owe tax when you file your tax return and may owe a penalty. If too much is withheld, generally you will be due a refund.

Complete a new Form W-4 when changes to your personal or financial situation would change the entries on the form. For more information on withholding and when you must furnish a new Form W-4, see Pub. 505.

Exemption from withholding. You may claim exemption from withholding for 2020 if you meet both of the following conditions: you owed no federal tax in 2019 **and** you expect to owe no federal income tax in 2020. You owed no federal income tax in 2019 if your total tax on line 16 on your 2019 Form 1040 is zero or if line 16 is less than the refundable credits on the total of lines 18a, 18b, and 18c. You expect to owe no federal income tax in 2020 if you expect the same result in 2020. If you claim exemption, you will have no income tax withheld from your paycheck and may owe taxes and penalties when you file your 2020 tax return. To claim exemption from withholding, certify that you meet both of the conditions above by writing "Exempt" on Form W-4 in the space below Step 4(c) and complete Steps 1 and 5. Do not complete any other steps on Form W-4. If you claim an exemption from withholding, you will need to submit a new Form W-4 by February 16, 2021.

Your Privacy

If you want additional withholding and are concerned about your privacy in Steps 2 and/or 4(a), you may check the box in Step 2(c) or enter an additional amount you want withheld per pay period in Step 4(c).

When to use the estimator. Consider using the estimator at www.irs.gov/W4App if you:

1. Expect to work only part of the year;
2. Have dividend or capital gain income or are subject to additional taxes, such as the net investment income tax;
3. Have self-employment income (see below);
4. Prefer the most accurate withholding for multiple job situations; or
5. Prefer to limit information provided in Steps 2 through 4 but don't want to sacrifice accuracy.

Self-employment. Generally, you will owe both income and self-employment taxes on any self-employment income you receive separate from the wages you receive as an employee. If you want to pay these taxes through withholding from your wages, use the estimator at www.irs.gov/W4App to figure the amount to have withheld.

Nonresident alien. If you're a nonresident alien, see Notice 1392, Supplemental Form W-4 Instructions for Nonresident Aliens, before completing this form.

Specific Instructions

Step 1(c). Check your anticipated filing status. This will determine the standard deduction and tax rates used to compute your withholding.

Step 2. Use this step if you have more than one job at the same time or are married filing jointly and you and your spouse both work.

Consider checking the box in Step 2 if there are only two jobs in the household. The standard deduction and tax brackets will be divided equally between the two jobs.



Multiple job households. Complete Steps 3 through 4(b) on only one Form W-4 in the household. Withholding will be most accurate if you do this on the Form W-4 for the highest paying job.

Step 3. Step 3 of Form W-4 provides instructions for determining the amount of the child tax credit and the credit for other dependents that you may be able to claim when you file your tax return. To qualify for the child tax credit, the child must be under age 17 as of December 31, must be your dependent who generally lives with you for more than half the year, and must have the required social security number. You may be able to claim a credit for other dependents for whom a child tax credit can't be claimed, such as an older child or a qualifying relative. For additional eligibility requirements for these credits, see Pub. 972, Child Tax Credit and Credit for Other Dependents. You can also include **other tax credits** in this step, such as education tax credits and the foreign tax credit. To do so, add an estimate of the amount for the year to your credits for dependents and enter the total amount in Step 3. Including these credits will increase your paycheck and reduce the amount of any refund you may receive when you file your tax return.

Step 4 (optional).

Step 4(a). Enter in this step the total of your other estimated income for the year, if any. You shouldn't include income from any jobs. If you complete Step 4(a), you likely won't have to make estimated tax payments for that income. If you prefer to pay estimated tax rather than having tax on other income withheld from your paycheck, see Form 1040-ES, Estimated Tax for Individuals.

Step 4(b). Enter in this step the amount from the Deductions Worksheet, line 5, if you expect to claim deductions other than the basic standard deduction on your 2020 tax return and want to reduce your withholding to account for these deductions. This includes both itemized deductions and other deductions such as for student loan interest and IRAs.

Step 4(c). Enter in this step any additional tax you want withheld from your pay **each pay period**, including any amounts from the Multiple Jobs Worksheet, line 4. Entering an amount here will reduce your paycheck and will either increase your refund or reduce any amount of tax that you owe.

Multiple Jobs Worksheet (Keep for your records.)

Use this worksheet if you choose the option in Step 2(b) on Form W-4. Complete this worksheet for only one of the jobs in the household and enter the result on the Form W-4 for that job. Withholding will be most accurate if you enter the result on the Form W-4 for the highest paying job.

Note: If more than one job has annual wages of more than \$99,000 or there are more than three jobs, see Pub. 505 for additional tables; or, you can use the online withholding estimator at www.irs.gov/W4App.

- 1 Two jobs.** If you have two jobs or you're married filing jointly and your spouse also works, find the amount from the appropriate table on page 4. Using the "Higher Paying Job" row and the "Lower Paying Job" column, find the value at the intersection of the two household salaries and enter that value on line 1. Then, **skip** to line 3 **1** \$ _____
- 2 Three jobs.** If you and/or your spouse have three jobs at the same time, complete lines 2a, 2b, and 2c below. Otherwise, skip to line 3.
- a** Find the amount from the appropriate table on page 4 using the annual wages from the highest paying job in the "Higher Paying Job" row and the annual wages for your next highest paying job in the "Lower Paying Job" column. Find the value at the intersection of the two household salaries and enter that value on line 2a **2a** \$ _____
- b** Add the annual wages of the two highest paying jobs from line 2a together and use the total as the wages in the "Higher Paying Job" row and use the annual wages for your third job in the "Lower Paying Job" column to find the amount from the appropriate table on page 4 and enter on line 2b **2b** \$ _____
- c** Add the amounts from lines 2a and 2b and enter the result on line 2c **2c** \$ _____
- 3** Enter the number of pay periods per year for the highest paying job. For example, if that job pays weekly, enter 52; if it pays every other week, enter 26; if it pays monthly, enter 12, etc. **3** _____
- 4 Divide** the annual amount on line 1 or line 2c by the number of pay periods on line 3. (You may round this to the closest whole dollar amount.) Enter this amount here and in **Step 4(c)** of Form W-4 for the highest paying job (along with any other additional amount you want withheld) **4** \$ _____

Deductions Worksheet (Keep for your records.)

- 1** Enter an estimate of your 2020 itemized deductions. Such deductions may include qualifying home mortgage interest, charitable contributions, state and local taxes (up to \$10,000), and medical expenses in excess of 10% of your income **1** \$ _____
- 2** Enter: $\left\{ \begin{array}{l} \bullet \$XX,XXX \text{ if you're married filing jointly or qualifying widow(er)} \\ \bullet \$XX,XXX \text{ if you're head of household} \\ \bullet \$XX,XXX \text{ if you're single or married filing separately} \end{array} \right\}$ **2** \$ _____
- 3** If line 1 is greater than line 2, subtract line 2 from line 1. If line 2 is greater than line 1, enter "-0-" **3** \$ _____
- 4** Enter an estimate of your student loan interest, deductible IRA contributions, and certain other adjustments. See Pub. 505 for more information **4** \$ _____
- 5 Add** lines 3 and 4. Enter the result here and in **Step 4(b)** of Form W-4 **5** \$ _____

Privacy Act and Paperwork Reduction Act Notice. We ask for the information on this form to carry out the Internal Revenue laws of the United States. Internal Revenue Code sections 3402(f)(2) and 6109 and their regulations require you to provide this information; your employer uses it to determine your federal income tax withholding. Failure to provide a properly completed form will result in your being treated as a single person with no other entries on the form; providing fraudulent information may subject you to penalties. Routine uses of this information include giving it to the Department of Justice for civil and criminal litigation; to cities, states, the District of Columbia, and U.S. commonwealths and possessions for use in administering their tax laws; and to the Department of Health and Human Services for use in the National Directory of New Hires. We also may disclose this information to other countries under a tax treaty, to federal and state agencies to enforce federal nontax criminal laws, or to federal law enforcement and intelligence agencies to combat terrorism.

You are not required to provide the information requested on a form that is subject to the Paperwork Reduction Act unless the form displays a valid OMB control number. Books or records relating to a form or its instructions must be retained as long as their contents may become material in the administration of any Internal Revenue law. Generally, tax returns and return information are confidential, as required by Code section 6103.

The average time and expenses required to complete and file this form will vary depending on individual circumstances. For estimated averages, see the instructions for your income tax return.

If you have suggestions for making this form simpler, we would be happy to hear from you. See the instructions for your income tax return.

[illegible][illegible][illegible]

2020 W-4 – FAQs

1. Why redesign Form W-4?

The new design reduces the form's complexity and increases the transparency and accuracy of the withholding system. While it uses the same underlying information as the old design, it replaces complicated worksheets with more straightforward questions that make accurate withholding easier for employees.

2. What happened to withholding allowances?

Allowances are no longer used for the redesigned Form W-4 to increase transparency, simplicity, and accuracy. In the past, the value of a withholding allowance was tied to the amount of the personal exemption. Due to changes in law, currently you cannot claim personal exemptions or dependency exemptions.

3. Are all employees required to submit a new Form W-4?

No. Employees who have submitted Form W-4 in any year before 2020 are not required to submit a new form merely because of the redesign. Employers will continue to compute withholding based on the information from the employee's most recently submitted Form W-4.

Employee FAQs

4. My tax situation is simple. Are some questions optional?

Yes. The form is divided into 5 steps. The only two steps required for all employees are Step 1, where you enter personal information like your name and filing status, and Step 5, where you sign the form. If Steps 2 – 4 apply to you, your withholding will more accurately match your tax liability if you complete them.

5. What happens if I only fill out step 1 and then sign the form?

Your withholding will be computed based on your filing status's standard deduction and tax rates, with no other adjustments.

6. When should I increase my withholding?

You should increase your withholding if:

- you hold more than one job at a time or you and your spouse both have jobs (Step 2) or
- you have income from sources other than jobs that is not subject to withholding (line 4a).

If you do not make these adjustments, you will likely owe additional tax when filing your tax return, and you may owe interest and penalties. With regard to income from other sources, you can pay estimated tax instead of having extra withholding.

7. When should I decrease my withholding?

If you are eligible for income tax credits such as the child tax credit or credit for other dependents, and/or you are eligible for deductions (other than the standard deduction), you can follow the instructions described in lines 3 and 4b to decrease your withholdings by the appropriate amount.

8. I want a refund when I file my tax return. How should I complete the redesigned Form W-4?

The redesigned Form W-4 makes it easier for you to have your withholding match your tax liability. But some employees may prefer to have more of their money withheld from their paychecks throughout the year and then get that money back as a refund when they file their tax returns. The simplest way to increase your withholding is to enter on line 4c the additional amount you would like your employer to withhold from each paycheck after your Form W-4 takes effect. You also can check the box in Step 2(c) to have an additional amount withheld for reasons other than

multiple jobs. Whether you will be due a refund (and, if so, the amount of your refund) when you file your tax return depends on the details of your entire tax situation.

9. Why do I need to account for multiple jobs (Step 2)? I have never done that before.

Tax rates increase as income rises, and only one standard deduction can be claimed on each tax return, regardless of the number of jobs in the household. Therefore, if you have more than one job at a time or are married filing jointly and both you and your spouse work, more money should usually be withheld from the combined pay for all the jobs than would be withheld if each job was considered by itself. Adjustments to your withholding usually should be made to avoid owing additional tax, and potentially penalties and interest, when you file your tax return. All of this has been true for many years; it did not change with the recent tax law changes. The old Form W-4 accounted for multiple jobs using detailed instructions and worksheets that many employees may have overlooked. Step 2 of the redesigned Form W-4 lists three different options you may choose from to make the necessary withholding adjustments.

10. Which option in Step 2 should I use to account for my multiple jobs? Which is most accurate? What if I don't want to reveal to my employer on my W-4 that I have a second job?

Step 2 allows you to choose **one** of three options, which involve tradeoffs between accuracy, privacy, and ease of use:

- **Option 1:** For maximum accuracy and privacy (to avoid revealing to your employer on your W-4 that you have multiple jobs) use the Tax Withholding Estimator at www.irs.gov/W4app. You will be guided to enter an additional amount to withhold on line 4c. You will need to know the approximate amount of pay for each job, but you will need to enter the additional amount on the Form W-4 for only one of the jobs. If pay for any of the jobs changes significantly, you will need to furnish a new Form W-4 to have accurate withholding.
- **Option 2:** If you do not have access to the online Tax Withholding Estimator but wish to have roughly accurate withholding while retaining privacy, you may use Worksheet 1 on page 3 and similarly be guided to enter an additional amount to withhold on line 4c. You will need to know the approximate amount of pay for each job, but you will need to enter the additional amount on the Form W-4 for only one of the jobs. If pay for any of the jobs changes the additional withholding amount in the lookup table, you will need to furnish a new Form W-4 to have accurate withholding.
- **Option 3:** If there are only two jobs held at the same time in your household, you may check the box in Step 2 on the forms for both jobs. The standard deduction and tax brackets will be divided equally between the two jobs. You would not need to furnish a new Form W-4 to account for pay changes at either job. This option is less accurate—more tax than necessary may be withheld from your wages—but you generally won't have too little tax withheld. (The more similar the earnings at the two jobs, the more accurate this option will be. To get an idea of how much overwithholding you can expect in your case, see the tables that will be provided in the 2020 Pub. 505.) This option reveals to your employer on your W-4 that you have multiple jobs in your household. But it also is the easiest option to use: just check the box.

11. The instructions above Step 3 say that in multiple job households, adjustments in lines 3 through 4b are to be made on only one form, and that withholding will be most accurate if the adjustments are made on the W-4 for the highest paying job. But what happens if pay at two jobs is relatively similar or if the job that pays more changes over time?

In general, making these adjustments on the Form W-4 for the highest paying job increases accuracy. However, if the jobs in your household pay about the same or if the job that pays more changes over time, it is less important which Form W-4 is used to make the adjustment.

12. What if I have a side gig where I'm not treated as an employee?

If you have self-employment income, you will generally owe both income tax and self-employment tax. Form W-4 is primarily intended to be used by employees who are not subject to self-employment tax. Thus, like the old Form W-4, the redesigned Form W-4 does not compute self-employment tax. If you would like to use Form W-4 to make an adjustment to your withholding to account for self-employment income that you will receive from another source, use the Tax Withholding Estimator at www.irs.gov/W4app or refer to IRS Publication 505.

13. What if I don't want to reveal my non-job income, such as income from earnings on investments or retirement income, to my employer (line 4a)?

You are not required to have tax on non-wage income withheld from your paycheck. Instead, you can pay estimated tax on this income using Form 1040-ES, Estimated Tax for Individuals. However, if you want to use Form W-4 to have tax for this income withheld from your paycheck, you have two options. You can report the income on line 4a. If you don't want to report this income directly on line 4a, you can use the Tax Withholding Estimator at www.irs.gov/W4app. The estimator will help you calculate the additional amount of tax that should be withheld from your paycheck. You will then enter that amount on line 4c, without reporting the income to your employer. You also can check the box in Step 2(c) to have an additional amount withheld for reasons other than multiple jobs. If you expect to have dividend or capital gain income, your withholding will be more accurate if you have the estimator compute the withholding adjustment rather than reporting this income on line 4a.

14. I have a more complex tax situation. Is there a computer program I can use to help me complete Form W-4?

Yes. To provide maximum accuracy, you are encouraged to use the Tax Withholding Estimator available at www.irs.gov/W4app. Updates and improvements to the estimator are underway that will be compatible with the redesigned Form W-4 in 2020. You may wish to use the withholding estimator if you:

- expect to work only part of the year,
- have dividend or capital gain income or are subject to additional taxes, such as the net investment income tax,
- have self-employment income,
- prefer the most accurate withholding for multiple job situations, or
- prefer to limit information provided in Steps 2–4 but do not want to sacrifice accuracy.

Employer FAQs

15. Does this mean our software will need two systems—one for forms submitted before 2020 and another for forms submitted after 2019?

Not necessarily. The same set of withholding tables will be used for both sets of forms. You can apply these tables separately to systems for new and old forms. Or, rather than having two separate systems, you may prefer to use a single system based on the redesigned form. To do this, you could enter zero or leave blank information for old forms for the data fields that capture the information on the redesigned form but was not provided to you under the old design. Additional guidance will be provided on the payroll calculations needed based on the data fields on the new and old forms.

16. How do I treat employees hired after 2019 who do not submit a Form W-4?

New employees who fail to submit a Form W-4 after 2019 will be treated as a single filer with no other adjustments. This means that a single filer's standard deduction with no other entries will be taken into account in determining withholding. The IRS and the Treasury Department anticipate issuing guidance consistent with this approach.

17. Are employees hired after 2019 required to use the redesigned form?

Yes. Beginning in 2020, all new employees must use the redesigned form. Similarly, any employees hired prior to 2020 who wish to adjust their withholding must use the redesigned form.

18. What about employees hired prior to 2020 who want to adjust withholding from their pay dated January 1, 2020, or later?

Employees must use the redesigned form.

19. May I ask all of my employees hired before 2020 to submit new Forms W-4 using the redesigned version of the form?

Yes. You may ask, but as part of the request you should explain that:

- they are not required to submit new Form W-4 and
- if they do not submit a new Form W-4, withholding will continue based on a valid form previously submitted.

For those employees who furnished forms before 2020 and who do not furnish a new one after 2019, you must continue to withhold based on the forms previously submitted. You are not permitted to treat employees as failing to furnish Forms W-4 if they don't furnish a new Form W-4. Note that special rules apply to Forms W-4 claiming exemption from withholding.

20. Will there still be an adjustment for nonresident aliens?

Yes. The IRS will provide instructions in the 2020 Publication 15-T, Federal Income Tax Withholding Methods on the additional amounts that should be added to wages to determine withholding for nonresident aliens. Additionally, nonresident alien employees should continue to follow the special instructions in Notice 1392 when completing their Forms W-4.

EMAIL COMMUNICATION

Date: November 6, 2019

Subject: PeopleAdmin update

HR Liaisons,

In the HRL Meeting on October 10th, we announced that we were moving forward with implementing PeopleAdmin SelectSuite, a unified Talent Management System that includes Applicant Tracking, Position Management, Performance Management and Onboarding. We are excited to share further details on the scope of this project, and to provide information on how the first phase of implementation will benefit your units.

Applicant Tracking System (ATS)

Auburn currently uses 2 different versions of PeopleAdmin for Applicant Tracking: version 7.0 for faculty recruitment, and version 5.8 for non-faculty recruitment. Phase I of the project will include upgrading the non-faculty ATS from version 5.8 to version 7.0, which will allow for more enhanced and automated recruitment processing. We plan to implement this upgrade in January 2020. More details regarding implementation timelines will be shared as the project progresses.

As we begin the project, we would like to provide you with an overview of how PeopleAdmin ATS version 7.0 will simplify non-faculty hiring and increase efficiency for your units.

Benefits of PeopleAdmin Applicant Tracking version 7.0:

- Automated and transparent review and approval workflows for postings
- New automated processes for selecting finalists and obtaining approvals, all completed within the system
- An enhanced applicant experience, including a customized website for job seekers and a more streamlined application process
- Increased reporting and analytics tools
- Automated generation and submission of offer letters, allowing customization for your units
- Increased quality and efficiency of communications for candidates and internal users
- A mobile-friendly site for applicants and internal users

Significant modifications to current process:

- Creation of a Hiring Proposal process that facilitates the selection, pay approval, and offer process for all hires
- Transition of pay decision approvals to the PeopleAdmin system
- Creation of new user roles in the Posting and Hiring Proposal processes that will include staff who do not currently use PeopleAdmin

In the coming months, you can expect communications including:

- A request to assist us in identifying user roles for your units,
- Specific dates/times for training,
- A plan for transitioning from PeopleAdmin version 5.8 to version 7.0, and
- A finalized "go-live" date.

We anticipate the learning curve that will come with implementing the upgraded Applicant Tracking System, and we will support users in becoming proficient and knowledgeable in newly defined processes and functionalities. We will offer live training opportunities, videos and guides to assist you and your units in this transition.

Additional information regarding future phases will be forthcoming. Thank you for your patience and flexibility as we navigate this process together. For additional information regarding the PeopleAdmin Applicant Tracking System implementation, please contact Chris Thompson or Jenna Richards.



HR LIAISON NETWORK MEETING



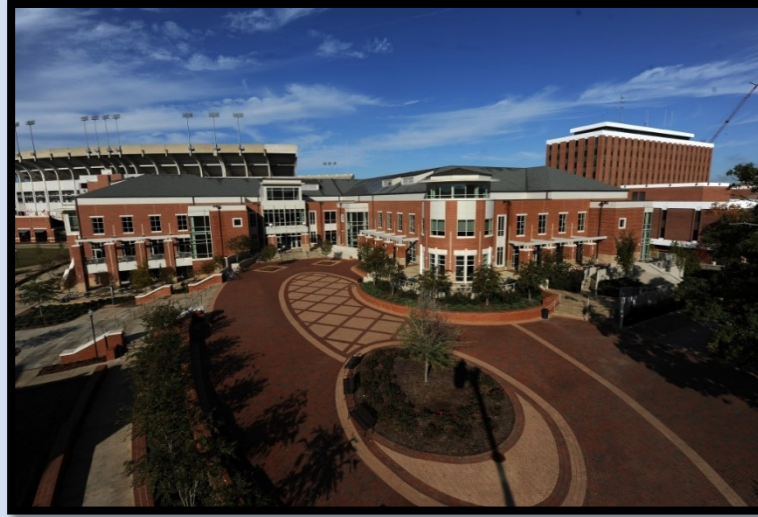
WELCOME AND ANNOUNCEMENTS

Leanne Fuller



HR LIAISON NETWORK UPDATES

Leanne Fuller



DEPARTMENTAL ONBOARDING

Kim Rogers, ACES

Trey Lightner, Student Affairs

Amanda Smitherman, Agriculture

Sue Robinson, Forestry and Wildlife Sciences



90 Day Employee Onboarding Checklist

Name _____ Position _____
Department/Home County _____ Start Date _____

Welcome aboard and we are so excited to have you on our team! This checklist is intended to be self-paced however, please work with your supervisor and/or mentor(s) to complete within your initial 90 days.

Administrative Items	
<input type="checkbox"/> Payroll	<input type="checkbox"/> Directory Photo
<input type="checkbox"/> Benefits	<input type="checkbox"/> Business Cards
<input type="checkbox"/> Auburn University Identification Card	<input type="checkbox"/> Staples Account (if applicable) / Departmental Ordering Process
<input type="checkbox"/> On Campus / Off Campus	<input type="checkbox"/> Verify Security Access for Finance & HR Systems (if applicable)
<input type="checkbox"/> Keys/Swipe card access for building and office	<input type="checkbox"/> Review Travel Vouchers
<input type="checkbox"/> Purchasing Card Authority	<input type="checkbox"/> Review ACES P Card Process
<input type="checkbox"/> ACES Travel Itinerary	<input type="checkbox"/> Directions for Using P Card
<input type="checkbox"/> Travel Voucher FAQ	<input type="checkbox"/> Purchasing Card
<input type="checkbox"/> Visa Reconciliation Form	

Required Training	Resources
<input type="checkbox"/> AU Risk Management Courses <ul style="list-style-type: none">Fleet SafetyPrevent Discrimination & Harassment TogetherProtecting Children: Identifying & Reporting Misconduct	<input type="checkbox"/> ACES.edu <ul style="list-style-type: none">Staff DirectoryACES Policy ManualExtension Mission & PhilosophyACES Organization & StructureBase Program AreasIntranet
<input type="checkbox"/> Civil Rights – Dr. Paul Waddy/Chris McClendon	<input type="checkbox"/> Auburn.edu
<input type="checkbox"/> SANS Security Training	<input type="checkbox"/> AU Access
	<input type="checkbox"/> HRD Courses

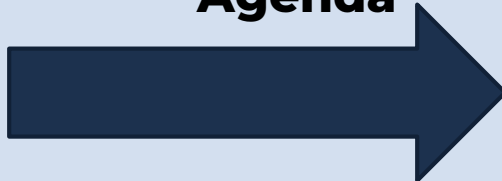
Review Job Description and Expectations	
<input type="checkbox"/> Discuss Job Description	<input type="checkbox"/> Discuss Organizational Expectations
<input type="checkbox"/> Probationary Period <ul style="list-style-type: none">Administrative Professional & University StaffNon Tenure Track Faculty- CEC, REA, Specialist	<input type="checkbox"/> Discuss Personal Professionalism
<input type="checkbox"/> Performance Management/Planning Document <ul style="list-style-type: none">Administrative Professional & University StaffNon Tenure Track Faculty- CEC, REA, Specialist	<input type="checkbox"/> Discuss Professional Development Opportunities & Professional Associations

Communications & Marketing	
<input type="checkbox"/> Start Up Request	<input type="checkbox"/> Social Media Policy
<input type="checkbox"/> Brand Guidelines	<input type="checkbox"/> Educational & Promotional Products
<input type="checkbox"/> Digital Strategy	<input type="checkbox"/> Business Cards
<input type="checkbox"/> Information Standards	<input type="checkbox"/> Name Tags

Onboarding Checklist



Foundations Agenda



Foundations Training

CASIC Building
August 8-9, 2019

Thursday, August 8

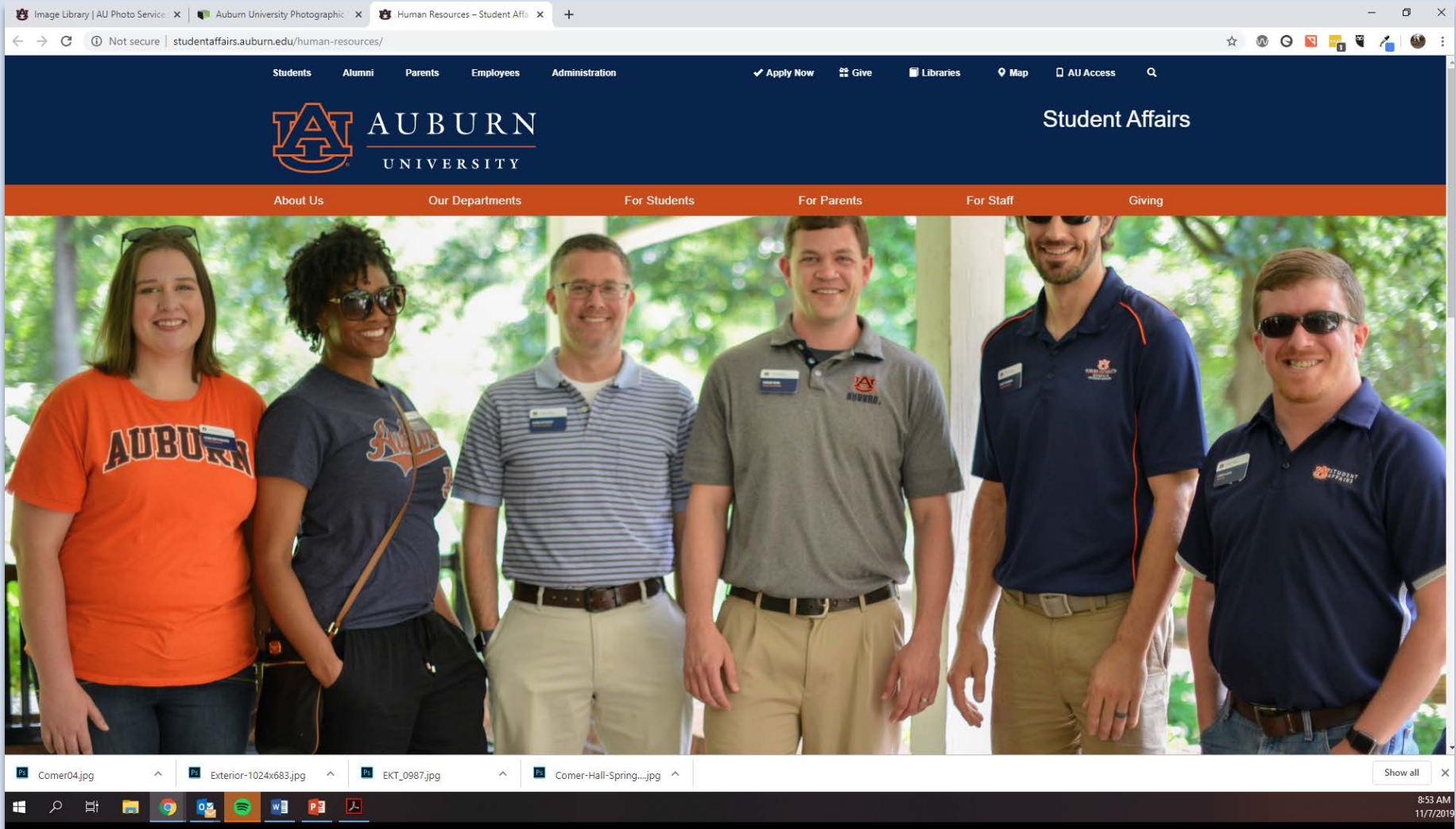
- 10:00 Welcome and introductions *Gary Lemme*
- 10:20 Unwavering Commitment to Alabama *Allen Malone*
- 10:30 What it means to serve as a regional agent, coordinator, or specialist *Paul Brown & Celvia Stovall*
- 11:45 Organizational Expectations *Celvia Stovall & Paul Brown*
- 12:15 Lunch
- 1:15 Your Role with compliance, ethics, & risk at AU *Kevin Robinson*
- 2:15 Break
- 2:30 You are the Brand & Navigating ACES online resources *Emery Tschetter & Jonathan Davis*
- 3:30 Building a Service Culture *Bill Shannon*
- 4:45 Adjourn

Friday, August 9

- 8:00 Preparing for Performance Success *Human Resources*
- 8:45 ACES Jeopardy
- 9:45 Break
- 10:00 Evaluation & Reporting *Ayanava Majumdar*
- 11:00 Inclusion in our workplace and in our programs *Cindy Canfield and Chris McClendon*
- 11:45 Wrap-up
- 12:00 Adjourn

The Alabama Cooperative Extension System (Alabama A&M University and Auburn University) is an equal opportunity educator and employer. Everyone is welcome!
www.aces.edu

HR website *(Student Affairs)*



STUDENT AFFAIRS

College of Agriculture
2019 Faculty Information Sessions

Date	Time	Topic	Speaker(s)
January 24, 2019	10:30 am – 1:00 pm	Promotion & Tenure Process and Best Practices	Paul Patterson Amy Wright Henry Fadamiro
February 21, 2019	10:30 am – 1:00 pm	Integrated Research & Extension	Dale Monks Mike Phillips Reuben Beverly
March 21, 2019	10:30 am – 1:00 pm	Instructional Programs	Amy Wright Steve Guice Margaret Marshall Chris Baglier Asim Ali Leonard Bell
April 11, 2019	9:30 am – 12:00 pm	The Land-Grant/Experiment Station Systems, Developing Hatch/Multistate projects, Hatch/NIFA Reporting, Research Funding Policies (Contract types, F&A distribution, Gift, Cost share)	Henry Fadamiro Juanita Winegar Dale Monks
May 16, 2019	10:30 am – 1:00 pm	Internal and Extramural Research Funding Opportunities, Grant Submission Procedures, Library Collections and Services	Henry Fadamiro Tony Ventimiglia Juanita Winegar Tim Hooper Claudine Jenda
TBA	TBA	Diversity and Inclusion Education Session- Best Practices that Foster Diversity and Cultivate Inclusion	Garry Morgan

Faculty Information Session Schedule



Promotion and Tenure Process – Information Session

January 24, 2019
109 Comer Hall
10:30 a.m. – 1:15 p.m.

Agenda:

- I. Welcome/opening remarks
- II. Dr. Paul Patterson – Dean's perspective
- III. Dr. John Beasley – Department Head's perspective
- IV. Dr. Cova Arias – Faculty member's perspective
- V. Drs. Amy Wright and Henry Fadamiro – College P&T Committee's perspective
- VI. Dr. Art Appel – University Committee's perspective
- VII. Dr. Bill Dozier – Best Practices
- VIII. Questions/comments
- IX. Adjourn

Promotion and Tenure Process Agenda

Integration Research and Extension – Information Session

February 21, 2019
109 Comer Hall
10:30 a.m. – 1:00 p.m.

Agenda:

- I. Welcome/opening remarks
- II. Dr. Dale Monks – Overview of the AAES/College/ACES Structure
- III. Dr. Reuben Beverly – Services of the AU Soil, Forage, and Water Testing Lab and Plant Diagnostic Lab
- IV. Dr. Mike Phillips – ACES Structure and Interactions with PPT Teams
- V. Questions/comments
- VI. Adjourn

Integration Research and Extension Agenda



School of Forestry & Wildlife Sciences

AUBURN UNIVERSITY

New Faculty – Administrative/Staff Orientation

Agenda

August 19, 2019

2:00 – 3:45

Dixon Conference Room

- | | |
|-------------|---|
| 2:00 | Welcome (Sue Robinson and Paula Davis) |
| 2:00 – 2:15 | Development (Heather Crozier, Sharon Tatum) |
| 2:15 – 2:30 | Student Services (Scott Enebak, Jodie Kenney, Wendy Franklin, Lisa Hollans) |
| 2:30 – 2:45 | SFWS IT (James Fukai, Andrew Thornton, Katherine Schwarzauser) |
| 2:45 – 3:00 | Graduate Student Support (Graeme Lockaby, Audrey Grindle) |
| 3:00 – 3:15 | Communications & Marketing (Jamie Anderson) |
| 3:15 – 3:30 | Financial Services (Paula Davis, Jason Hare, Suanne Gilbert, Kim Ward) |
| 3:30 – 3:45 | Building Services (Michelle Straw) and Land Management (Russell Miller) |

3301 School of Forestry & Wildlife Sciences Building
602 Duncan Drive, Auburn, AL 36849
auburn.edu/sfws | sfwscom@auburn.edu
334.844.1007



SCHOOL OF FORESTRY
AND WILDLIFE SCIENCES

New Faculty Agenda



AUBURN
UNIVERSITY

SCHOOL OF FORESTRY
AND WILDLIFE SCIENCES



HR DEVELOPMENT

Bill Shannon



RECORDS

Brittany Saliba

Terminations Terminating a Job (TERMJOB)

Description: If an employee has more than 1 job on campus and a job(s) needs terminating, then process a TERMJOB EPAF. The TERMJOB retains the active employee record (PEAEMPL) while terminating a job record (NBAJOBS).



3 Employee Tab -> Electronic Personnel Action Forms



4 New EAPF



5 Enter the Banner ID number

Query Date - Will Default to Today's Date

Approval Category - Termination (Job ONLY), TERMJOB

6 Go

New EAPF Person Selection

☐ Include only records that have been approved by the approver and select the Approval Category Selection

☐ Include all records that have been approved by the approver and select the Approval Category Selection

ID# | Display Johnson, John |

Query Date: |

Approval Category: |

Type	Position	Start Date	End Date	Last Paid Date	Status
Regular	0000000000	11/01/2024	11/01/2024	11/01/2024	Active
Termination	0000000000	11/01/2024	11/01/2024	11/01/2024	Terminated

Terminating a Job (TERMJOB)



BENEFITS (OPEN ENROLLMENT)

Teresa Coker

IMPORTANT DATES

NOV 1
12:01
a.m.

**Open
Enrollment
begins**

DEC 2
4:45
p.m.

**Open
Enrollment
ends**

During Open Enrollment, you will have the opportunity to:

- Enroll in coverage,
- Cancel existing coverage, or
- Update benefit elections.

-Effective Jan. 1, 2020



**ENROLL
ONLINE**

YEAR 2

- We are excited to offer online enrollment for the second year in a row!
- Please remember that you must select your 2020 benefits via AU Access.
- Benefits Enrollers will be available.

HEALTH INSURANCE PREMIUMS



IMPORTANT

- Our plan is self-insured, while administered by Blue Cross/Blue Shield of Alabama (BCBSAL).
- Each year, we assess our existing plan, along with the plan's cost, to determine needed changes for the following year.
- We have experienced cost increases in administrative fees from BCBSAL, American Behavioral, stop loss premiums, and medical cost trend.

HEALTH INSURANCE PREMIUMS

IMPORTANT

- Spousal costs continue to increase. In fact, spouses make up 24% of our plan's membership while accounting for 34% of total benefits claims.
- Thus, it is imperative that we account for these increased costs when determining the rates for our health plan.



HEALTH INSURANCE PREMIUMS

2020 COSTS

- Spousal tier rates will increase between 8 to 10%, depending on salary tier and coverage type.
- This change will result in an increase of \$18.63 to \$53.03 per month.



HEALTH INSURANCE PREMIUMS

2020 COSTS

- Non-spousal rates (meaning those for single employees and employees + child(ren)) will not increase.
- PLEASE REMEMBER: Benefits deductions are made on a pre-tax basis, thus lowering your taxable income.



HEALTH PLAN DESIGN CHANGES

	2019	2020
Calendar Year Deductible (limit of 3 per family)	\$250 per individual	\$500 per individual
Facility Inpatient Co-Payment	\$200	\$300
Facility Outpatient Co-Payment	\$200	\$300
Emergency Room Facility Co-Payment	\$200	\$300
Specialist Office Visit Co-Payment	\$35	\$40
Out-of-Pocket Maximum (Individual)	\$7,900	\$8,150
Out-of-Pocket Maximum (Family)	\$15,800	\$16,300

DENTAL AND VISION INSURANCE PREMIUMS

GOOD NEWS!

- There will be no premium increases for the dental and vision insurance plans for 2020.
- Additional information on our dental plan, administered by Blue Cross/Blue Shield of Alabama, and vision plan, administered by Superior Vision, is available online.



PRESCRIPTION COSTS

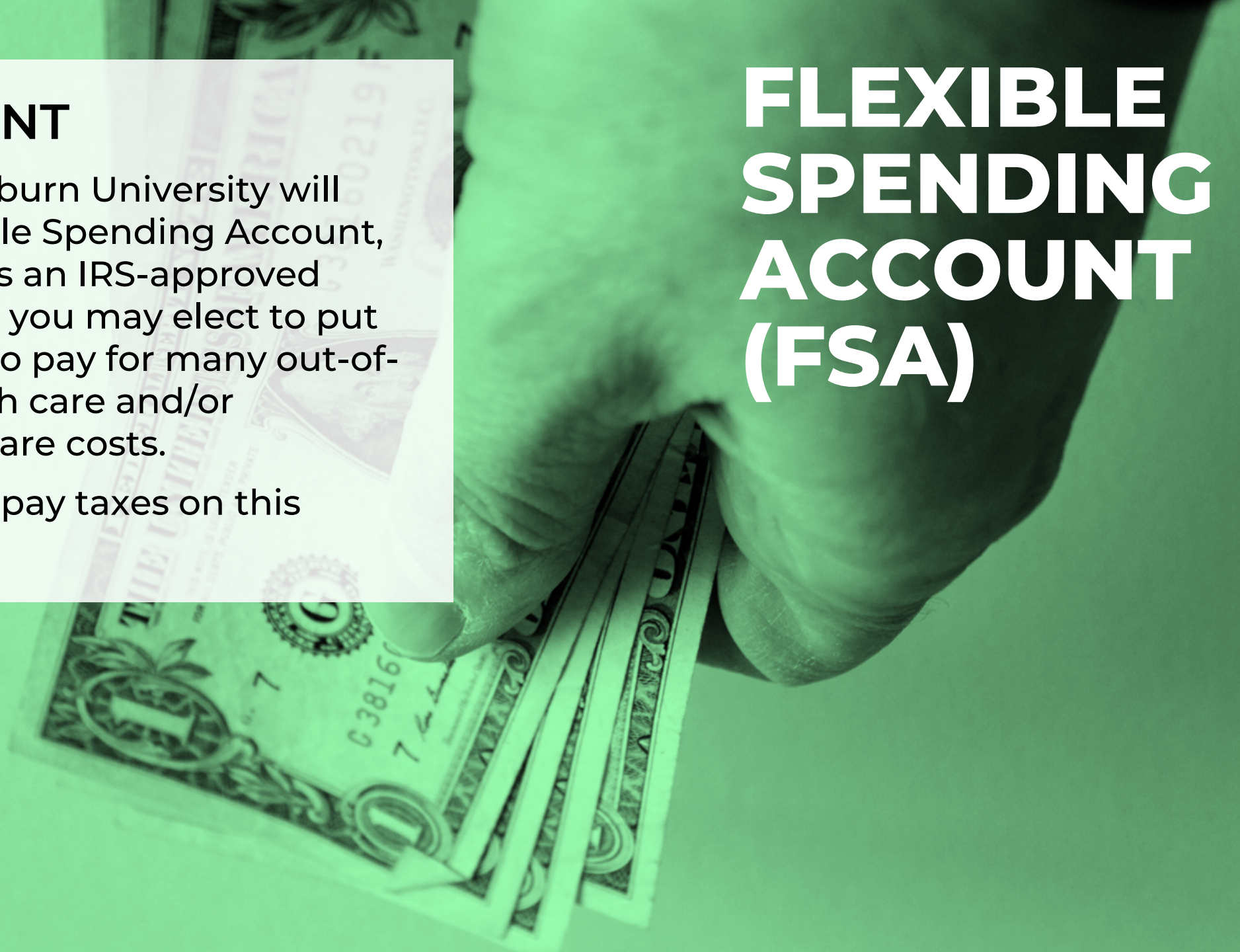
2020 COSTS

- In 2020, prescription drug co-payment tiers will increase by \$5 per tier.
- GOOD NEWS! Participation in the TigerMeds program (AU Employee Pharmacy) will eliminate your co-pay for Tier 1 generic prescriptions, and will reduce your co-pay for Tier 2 generic prescriptions.

IMPORTANT

- In 2020, Auburn University will offer a Flexible Spending Account, or FSA. This is an IRS-approved account that you may elect to put money into to pay for many out-of-pocket health care and/or dependent care costs.
- You do not pay taxes on this money.

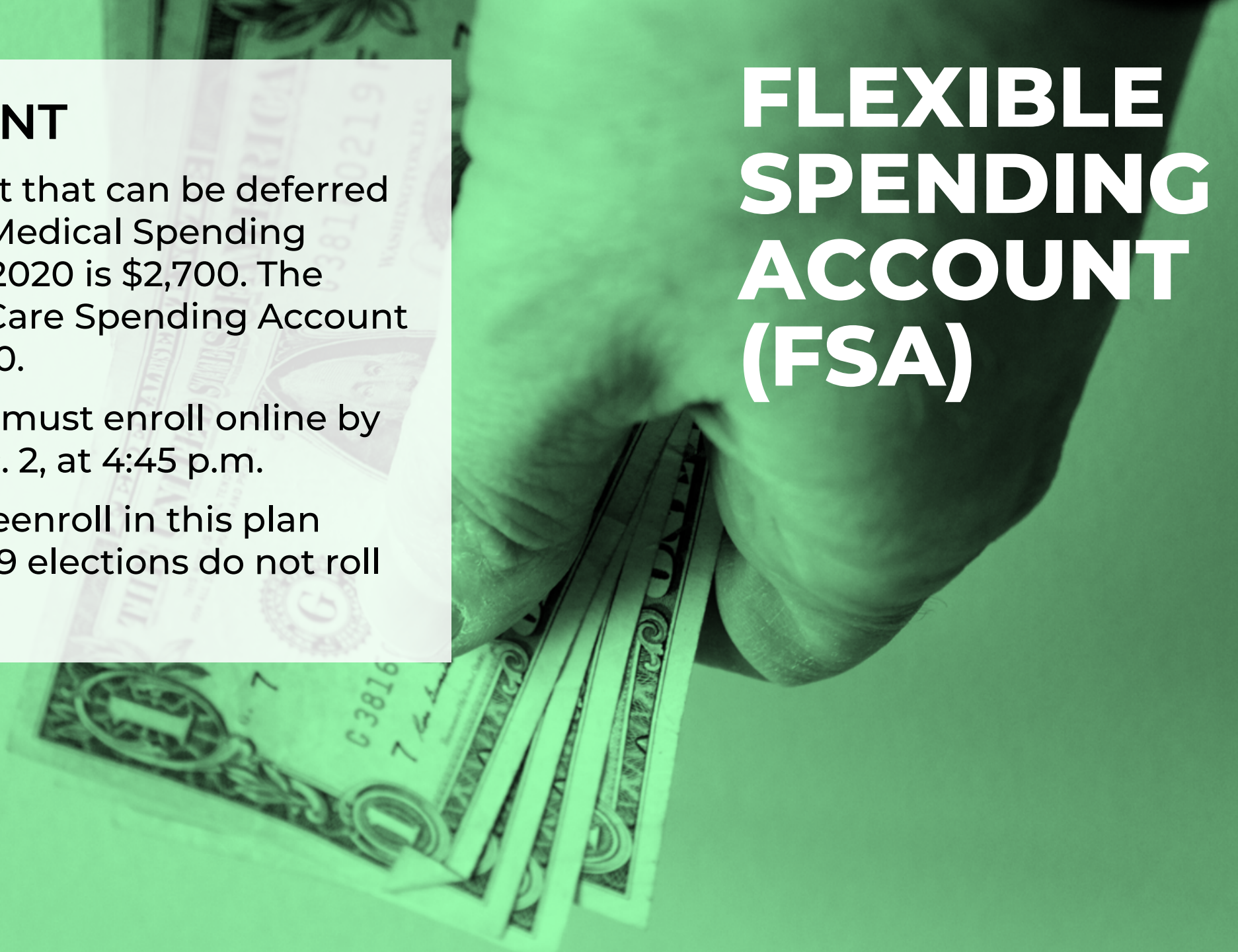
FLEXIBLE SPENDING ACCOUNT (FSA)



IMPORTANT

- The amount that can be deferred into an FSA Medical Spending Account for 2020 is \$2,700. The Dependent Care Spending Account limit is \$5,000.
- Employees must enroll online by Monday, Dec. 2, at 4:45 p.m.
- You must reenroll in this plan annually. 2019 elections do not roll over to 2020.

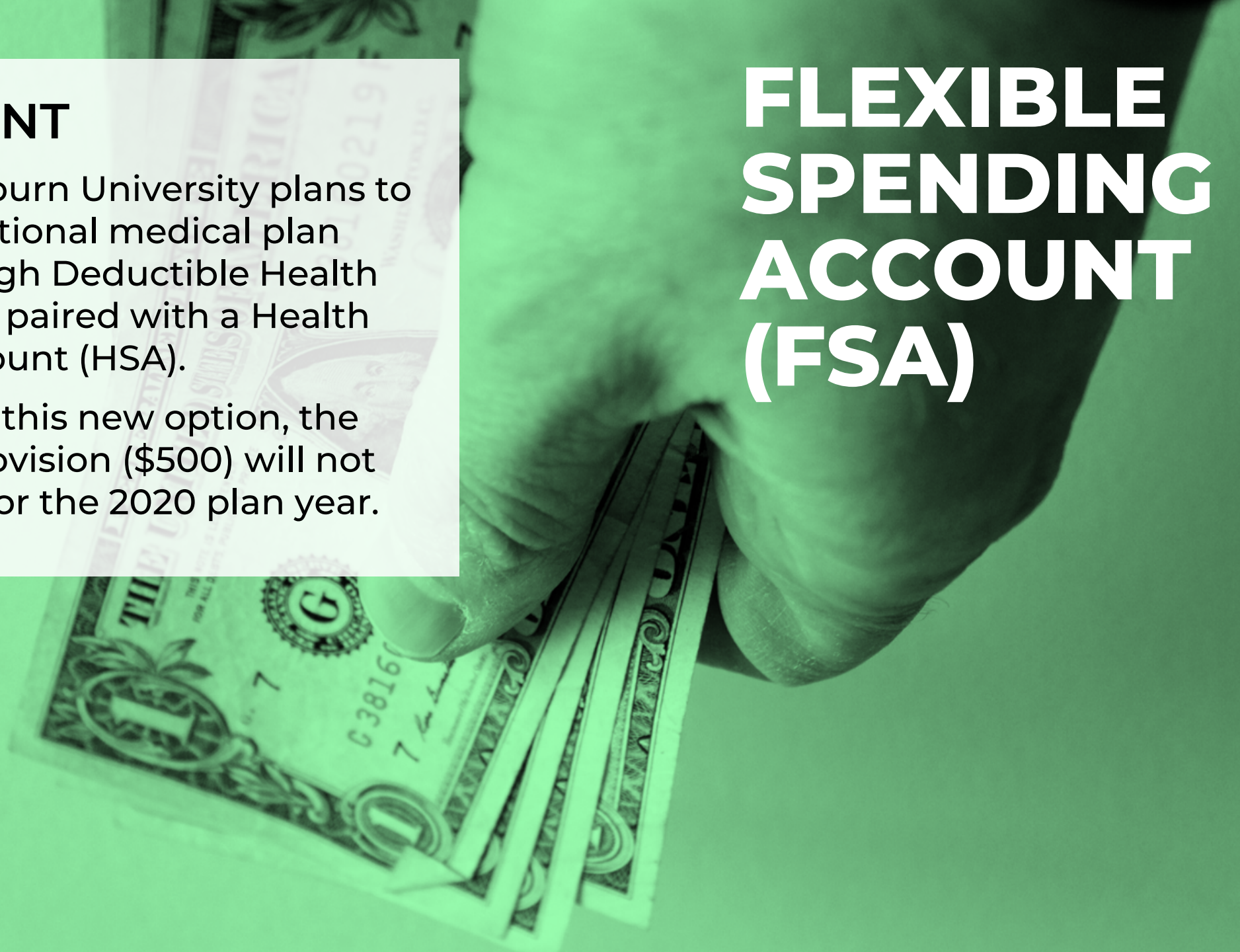
FLEXIBLE SPENDING ACCOUNT (FSA)



IMPORTANT

- In 2021, Auburn University plans to offer an additional medical plan option – a High Deductible Health Plan (HDHP) paired with a Health Savings Account (HSA).
- Because of this new option, the carryover provision (\$500) will not be in effect for the 2020 plan year.

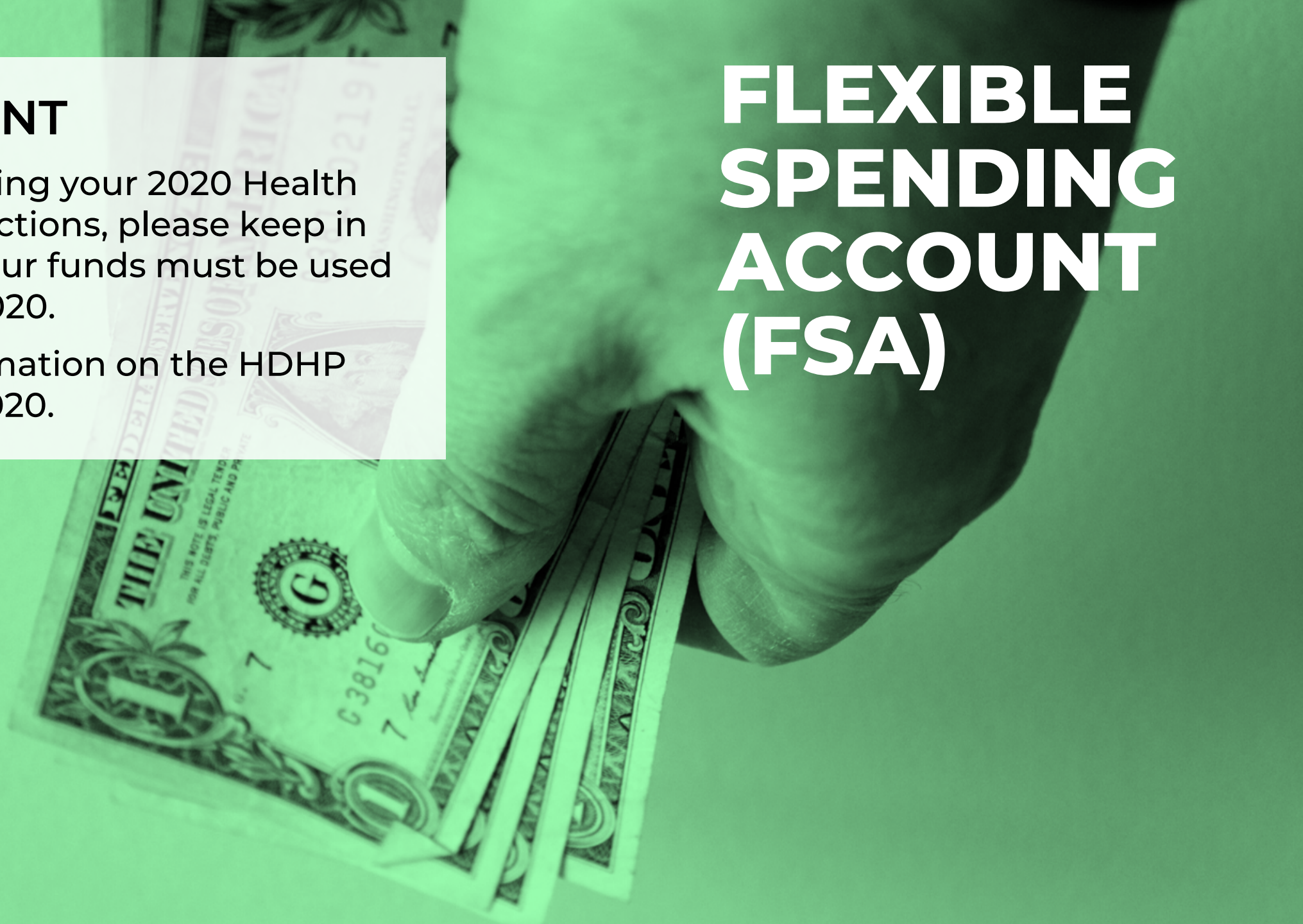
FLEXIBLE SPENDING ACCOUNT (FSA)



IMPORTANT

- When making your 2020 Health Care FSA elections, please keep in mind that your funds must be used by Dec. 31, 2020.
- More information on the HDHP coming in 2020.

FLEXIBLE SPENDING ACCOUNT (FSA)



A black and white photograph of a man and three children sitting together and reading a book. The man is on the left, wearing a plaid shirt, and is pointing at the text in the book. Three children are gathered around him, looking at the book with interest. The book is open to a page with text and a small illustration. The title 'Because of Winn-Dixie' is visible on the right page. The background is slightly blurred, showing some foliage.

ADDITIONAL INSURANCE PRODUCTS

- Group Cancer Insurance through Colonial Life, with Guaranteed Issue
- Group Critical Illness Insurance through Colonial Life, with Guaranteed Issue
- Whole Life Insurance through Colonial Life, with Guaranteed Issue
- Term Life Insurance through The Standard
- Long-Term Disability Insurance through The Standard

AU RETIREMENT PLANS

RETIREMENT SYSTEMS OF ALABAMA (RSA)

- Defined Benefit Plan
- Required for all eligible employees appointed 50% or more time
- Tier 1 (prior to Jan. 1, 2013) - 7.5% contribution
- Tier 2 (after Jan. 1, 2013) - 6.0% contribution
- Vested after 10 years of service



AU RETIREMENT PLANS

The background of the slide features a photograph of two dark-colored wooden Adirondack chairs positioned on a sandy beach. The chairs are angled towards the right, with the ocean and a hazy horizon in the background. The lighting suggests a soft, possibly early morning or late afternoon setting.

403(b) TAX-DEFERRED ANNUITY PLAN

- Vendors include: Fidelity, Lincoln Financial Group, TIAA and VALIC
- Match for full-time benefit eligible employees up to 5% of compensation, limited to \$1,650 per calendar year
- Vested after 5 years of eligible full-time service
- IRS contributions limit for 2019:
 - Under age 50 - \$18,500
 - Over age 50 - \$24,500

AU RETIREMENT PLANS

The background of the slide features a photograph of two dark-colored wooden Adirondack chairs positioned on a sandy beach. The chairs are angled towards the right, with the ocean and a hazy horizon in the background. The lighting suggests a soft, possibly early morning or late afternoon, atmosphere.

457(b) DEFERRED COMPENSATION PLAN

- Vendors include: Fidelity, TIAA, VALIC, and RSA Plan RSA-1
- No employer match
- IRS Contribution maximum for 2019:
 - Under age 50 - \$18,500
 - Over age 50 - \$24,500

SAVE THE DATE!

- This year's Benefits Fair will be held on Thursday, Nov. 14, from 7 a.m. until 5 p.m. at Beard-Eaves-Memorial Coliseum.
- There will be information about AU's insurance plans, retirement plans, wellness opportunities, and other campus resources.
- There will also be additional opportunities to meet with benefit enrollers (no appointment is necessary!)
- Bring your event postcard and employee ID to register for prizes.

EMPLOYEE BENEFITS FAIR

The background of the slide features a close-up photograph of several small, five-petaled orange flowers. The flowers are in sharp focus in the foreground, while others in the background are blurred, creating a sense of depth. The overall color palette is warm, dominated by the orange and brown tones of the flowers and the dark background.

DON'T FORGET!

- The Healthy Tigers discount is available for eligible employees and their spouses/sponsored adult dependents - up to \$600 annually!
- Benefit enrollers are available to assist employees. (More info at aub.ie/benefits).
- Open Enrollment ends at 4:45 p.m. on Dec. 2, 2019. No applications or changes will be allowed after this time!
- A dependent audit is coming in 2020.

QUESTIONS?

- Visit aub.ie/benefits
- Review the Open Enrollment materials that you will receive in the mail.
- Contact AU Human Resources at 844-4145 or email us at benefit@auburn.edu



Communication Tools website

The screenshot shows a web browser window with the URL `auburn.edu/administration/human_resources/benefits/oe-2020/communications.html`. The page features a dark blue header with the Auburn University logo and a navigation menu. Below the header is an orange banner with the text "ROCK ENROLL for your benefits" and dates "NOV 1-DEC 2". The main content area is white and contains text about online benefits enrollment, contact information for Patrick Johnston, and a section for digital signage images. The digital signage section shows two images: a poster for the "AUBURN UNIVERSITY EMPLOYEE BENEFITS FAIR" and a graphic featuring the Auburn University mascot playing a guitar.

← → ↻ ⓘ Not secure | auburn.edu/administration/human_resources/benefits/oe-2020/communications.html

AU Jobs HR Team HR Forms Employee Holidays AU Access Tiger Perks Campus Map People Finder Search

AUBURN UNIVERSITY

Important Links Benefits Campus Relations Compensation Employment HR Development Payroll Records

ROCK ENROLL

for your benefits · NOV 1-DEC 2

Open Enrollment Communications

Human Resources / Benefits / Open Enrollment 2020 / Open Enrollment Communications

Once again, Auburn University is pleased to offer online benefits enrollment to benefit-eligible employees.

Employees can now enroll for benefits at their favorite coffee shop, at the stadium, or even in their pajamas! Please help us share the posters and digital signage graphics on this page. All you need to do is right click on the digital signage image, or click on the poster image, to download it.

If you have questions, please contact Patrick Johnston, Communications and Marketing Specialist, at pvj0001@auburn.edu or (334) 844-1604.

(Special thanks to Auburn University Photographic Services and the Student Government Association for helping coordinate the photos of Aubie!)

Digital Signage 4x3





PAYROLL

Ashley Fetner

Form W-4 (2020)

Form W-4		Employee's Withholding Certificate		OMB No. 1545-0074
Department of the Treasury Internal Revenue Service				
▶ Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay. ▶ Give Form W-4 to your employer. ▶ Your withholding is subject to review by the IRS.				
2020				
Step 1: Enter Personal Information	(a) First name and middle initial		(b) Social security number	
	Last name			
	Address		▶ Does your name match the name on your social security card? If not, to ensure you get credit for your earnings, contact SSA at 800-772-1213 or go to www.ssa.gov .	
	City or town, state, and ZIP code			
(c)	<input type="checkbox"/> Single or Married filing separately <input type="checkbox"/> Married filing jointly (or Qualifying widow(er)) <input type="checkbox"/> Head of household (Check only if you're unmarried and pay more than half the costs of keeping up a home for yourself and a qualifying individual.)			
Complete Steps 2 through 4 ONLY if they apply to you. To see if you are exempt from withholding or if you have concerns about your privacy, see page 2. Everyone must complete Step 5. See instructions on page 2.				
Step 2: Multiple Jobs or Spouse Works	Complete this step if you (1) hold more than one job at a time, or (2) are married filing jointly and your spouse also works. The correct amount of withholding depends on income earned from all of these jobs. Do only one of the following.			
	(a) Use the estimator at www.irs.gov/W4App for most accurate withholding; or			
	(b) Use the Multiple Jobs Worksheet on page 3 and enter the result in Step 4(c) below for roughly accurate withholding; or			
(c) If there are only two jobs total, you may check this box. Do the same on Form W-4 for the other job. This option is accurate for jobs with similar pay; otherwise, more tax than necessary may be withheld. ▶ <input type="checkbox"/>				
CAUTION: If you have privacy concerns, choose (a) or (b). If you and/or your spouse have income from self-employment, including as an independent contractor, choose (a).				
Complete Steps 3 through 4(b) on Form W-4 for only one of these jobs. Leave those steps blank for the other jobs. (Your withholding will be most accurate if you complete Steps 3 through 4(b) on the Form W-4 for the highest paying job.)				
Step 3: Claim Dependents	If your income will be \$200,000 or less (\$400,000 or less if married filing jointly):			
	Multiply the number of qualifying children under age 17 by \$2,000 ▶ \$			
	Multiply the number of other dependents by \$500 ▶ \$			
Add the amounts above and enter the total here				3 \$
Step 4 (optional): Other Adjustments	(a) Other income. If you want tax withheld for other income you expect this year that won't have withholding, enter the amount of other income here. This may include interest, dividends, and retirement income. You should not include income from any jobs			
	4(a) \$			
	(b) Deductions. If you expect to claim deductions other than the standard deduction and want to reduce your withholding, use the Deductions Worksheet on page 3 and enter the result here			
				4(b) \$
(c) Extra withholding. Enter any additional tax you want withheld each pay period				4(c) \$
Step 5: Sign Here	Under penalties of perjury, I declare that this certificate, to the best of my knowledge and belief, is true, correct, and complete.			
	▶ Employee's signature (This form is not valid unless you sign it.)		▶ Date	
Employers Only	Employer's name and address		First date of employment	Employer identification number (EIN)
For Privacy Act and Paperwork Reduction Act Notice, see page 3.				
Cat. No. 102200 Form W-4 (2020)				



CLASSIFICATION AND COMPENSATION

Rod Kelly, Bailey Ward, and Shelly Murray

BANNER SUPERVISORY FIELDS – CURRENT STATE

NBAPOSN

- “Reports To”; Main Tab
- Utilized for true supervisor

Reports To	160420	...	Exec Dir, Comp & Class
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NBAJOBS

- ID & Position Fields w/ Name; Miscellaneous Tab
- Utilized for delegated authority (timekeeping, training approvals, etc.)

▼ MISCELLANEOUS	
Supervisor	
Effective Date	10/01/2019
ID	90 10 ... Roderick Fall Kelly
Position	160420 ...

BANNER SUPERVISORY FIELDS – PROPOSED STATE

NBAPOSN

- “Reports To”; Main Tab
- Utilized for true supervisor

NBAJOBS

- ID & Position Fields w/ Name; Miscellaneous Tab
- Utilized for true supervisor

BANNER SUPERVISORY FIELDS – PROPOSED STATE CONT.

Banner Proxy Table

Timekeeping	Leave Requests	Vendor Vouchers	HRD Approvals	ETC.

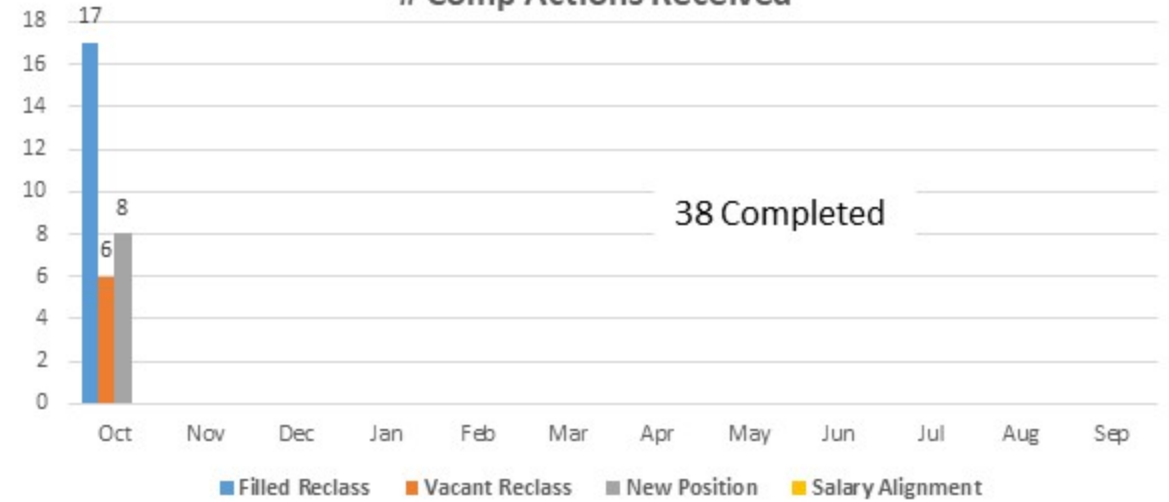
- ★ Important – Identify all systems and processes that pull from NBAJOBS delegated authority field.
- ★ Email Shelly Murray with any departmental systems and processes that currently utilize this field

Operational Metrics

Avg Days to Process Salary Offers



Comp Actions Received



Salary Offers Received





EMPLOYMENT SERVICES

Chris Thompson



Q&A

Leanne Fuller