Not initiated	Consulting	Planning	Implementing	Complete
5	4	3	2	1
OR % Complete				
0%	25%	50%	75%	100%

	in processes & support diversity initiatives													Comments
Function	Description	CEAS	CGS	GEA	Grad School	Lubar	OoR	PSOA	SARUP	SCE	SFS	SolS	UWMLib	
Investigations	Conduct investigations and grievance hearings; Provide reports on discrimination, complaints & disciplinary matters. Advise employees, managers and leadership on policies and procedures													*Process/service available, training ongoing for HRBPs
Affirmative Action Plans	Create, draft and/or prepare annual Diversity Assessment Report (DAR) on behalf of the Shared Services units served. Submit report for data reconciliation													*Process/service available, training ongoing for HRBPs
Climate	Provide advice and leadership for the study of departmental climate issues													*Process/service available, training ongoing for HRBPs
	support select processes related to new employees													
Function	Description	CEAS	CGS	GEA	Grad School	Lubar	OoR	PSOA	SARUP	SCE	SFS	SolS	UWMLib	
Criminal Background Checks	Oversee submission of CBC requests & monitor for applicants / employees; Communicate results appropriately													
Data Entry	Standardize new hire data entry into HRS. Includes person, position, job, manage profile and tenure tracking data. May be expanded with increased functionality													
Orientation Checklist	Provide onboarding checklists & resources to ensure provisioning, access & compliance with applicable law. Standardize Service Center processes for acclimating new employees													
Job Postings	Post advertisements for jobs; Track effectiveness of placements													
Position Approval	Develop & standardize automated workflow for requesting new positions & securing necessary approvals													
Search & Screen	Orient search and screen committees and provide consultation and support (i.e. coordinate S&S meetings, take minutes, retain records) throughout the recruitment process. NOTE: this does not include travel arrangements or coordinating schedules for finalists interviews													
Position Descriptions	Provide position description development services													
Succession Planning / Reorganization	Assistance regarding succession planning and reorganizations to optimize FTE use													
TALENT MANAGEMENT - Provide standards, training & resources on a variety of talent-related topics														
Function	Description	CEAS	CGS	GEA	Grad School	Lubar	OoR	PSOA	SARUP	SCE	SFS	SolS	UWMLib	
Mandatory Trainings	Assist in tracking & monitoring completion of mandated training (e.g. Sexual Harassment, Data Security) for Shared Services population													
Performance Management	Standardize resources / materials for performance management. Advise on policies and procedures related to evaluations, performance improvement													*Process/service available, training ongoing for HRBPs
COMPENSATION & PAYROLL ADMINIS	TRATION - Manage data entry for selected processes & monitor reports to ensure compliance													
Function	Description	CEAS	CGS	GEA	Grad School	Lubar	OoR	PSOA	SARUP	SCE	SFS	SolS	UWMLib	
Time and Leave Reporting	Ensure timesheets & leave reports are appropriately entered in HRS & approved by supervisors													
Payroll Error Reporting	Review payroll edits, payroll error messages & missing payroll reports; Make necessary corrections to payroll data													
One-Time Payments	Standardize data entry for all one-time payments to employees in HRS													

Additional Pay	Overloads and lump sum payments													
Pay Adjustments	Advise on policy and appropriate actions related to temporary lump sum or permanent adjustments for faculty or staff													
Pay Adjustments - Tracking	Route and manage requests for pay adjustments (i.e. overload, non-merit, pay for performance, temporary adjustments, etc) and enter into HRS													
Compensation Auditing	Review and audit HRS transactions related to pay adjustments													
Pay Plan	Advise on pay plan guidelines and assist supervisors in the allocation exercise. Coordinate with UBRs on files for budgeting. CAT access is limited to finance staff only													
	ources related to benefits & manage benefits data													
Function	Description	CEAS	CGS	GEA	Grad School	Lubar	OoR	PSOA	SARUP	SCE	SFS	SolS	UWMLib	
Benefits Counseling	Standardize documentation; Provide resources & best practices for benefits counseling													
Retirement Counseling	Provide retirement information & counseling to employees before retirement consultation with ETF													
Leave Administration	Monitor leave reporting to ensure compliance with leave entitlements; certify sick leave amounts for retirement													
Leave Management and payouts	Advise staff on leave policies and usage; monitor MSS/ESS and enter leave payouts at end of appointment. Monitor and advise on sick leave reduction process													
Data Management	Process Benefit entries in HRS (e.g. adjusted continuous service dates) and other ETF data entry													
Rehired Annuitants	Monitor hours worked by rehired annuitants to ensure compliance with applicable restrictions under state law													
Leave Tracking	For intermittent or ongoing FMLA/WFML leave monitor hours used per approved leave													
PURCHASING					<u>.</u>									
Function	Description	CEAS	CGS	GEA	Grad School	Lubar	OoR	PSOA	SARUP	SCE	SFS	SolS	UWMLib	Dragge implementation as held to allow 191
Procurement Intake	Determine pay mechanism and appropriate procurement process for all purchase requests.													Process implementation on hold to align with P2P project implementation, Spring 2021
P-CARD ADMINISTRATION					<u>'</u>									
Function  Dyrobaca Card Statement Starage	Description	CEAS	CGS	GEA	Grad School	Lubar	OoR	PSOA	SARUP	SCE	SFS	SolS	UWMLib	
Purchase Card Statement Storage  Purchase Card Statement Audit	Receive and scan statement and appropriate documentation; Save to SharePoint storage site.  Confirm receipt and verify scan for statements and documentation. Provide high-level audit of statement for appropriateness. Cross-check received statements with active P-Card statements to ensure all statements are received and stored appropriately.													
ACCOUNTS PAYABLE	· ···· ·· · · · · · · · · · · · · · ·													
Function	Description  And the Direct Description from Change Coming Control on the Indian	CEAS	CGS	GEA	Grad School	Lubar	OoR	PSOA	SARUP	SCE	SFS	SolS	UWMLib	
Direct Pay Audit Payment Initiation	Audit Direct Pay submissions from Shared Service Center population.  Initiate necessary documentation for the S/C/D for all Direct Pay/Low Dollar Order/Payment to Individual Request/External Requisitions.													Process implementation on hold to align with P2P project implementation, Spring 2021
Purchase Order Audit	Audit Purchase Order submissions from Shared Service Center population.													
TRAVEL ADMINISTRATION														
Function	Description	CEAS	CGS	GEA	Grad School	Lubar	OoR	PSOA	SARUP	SCE	SFS	SolS	UWMLib	
Expense Processing	Enter travel/misc. purchase expense requests into e-Reimbursement for requestor.													Discussions ongoing with UWSS regarding possible transition of audit function. TMEA rollout complete to campus as part of new travel exemption process with Safety Assurances.  Remaining services rollout in Fall 2020.
Expense & Travel Audit	Audit travel/misc. purchase expenses for Shared Services population; Approve expenses for payment.													