

**Payroll Office  
University of Washington  
Operational Performance Dashboard for  
June 2009  
Quarter 4 FY 2009 (Apr – Jun 2009)**

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**Our key processes include:**

*Pay People  
Provide Customer Service  
Administer Financial Reporting  
Manage Money  
Develop Staff*

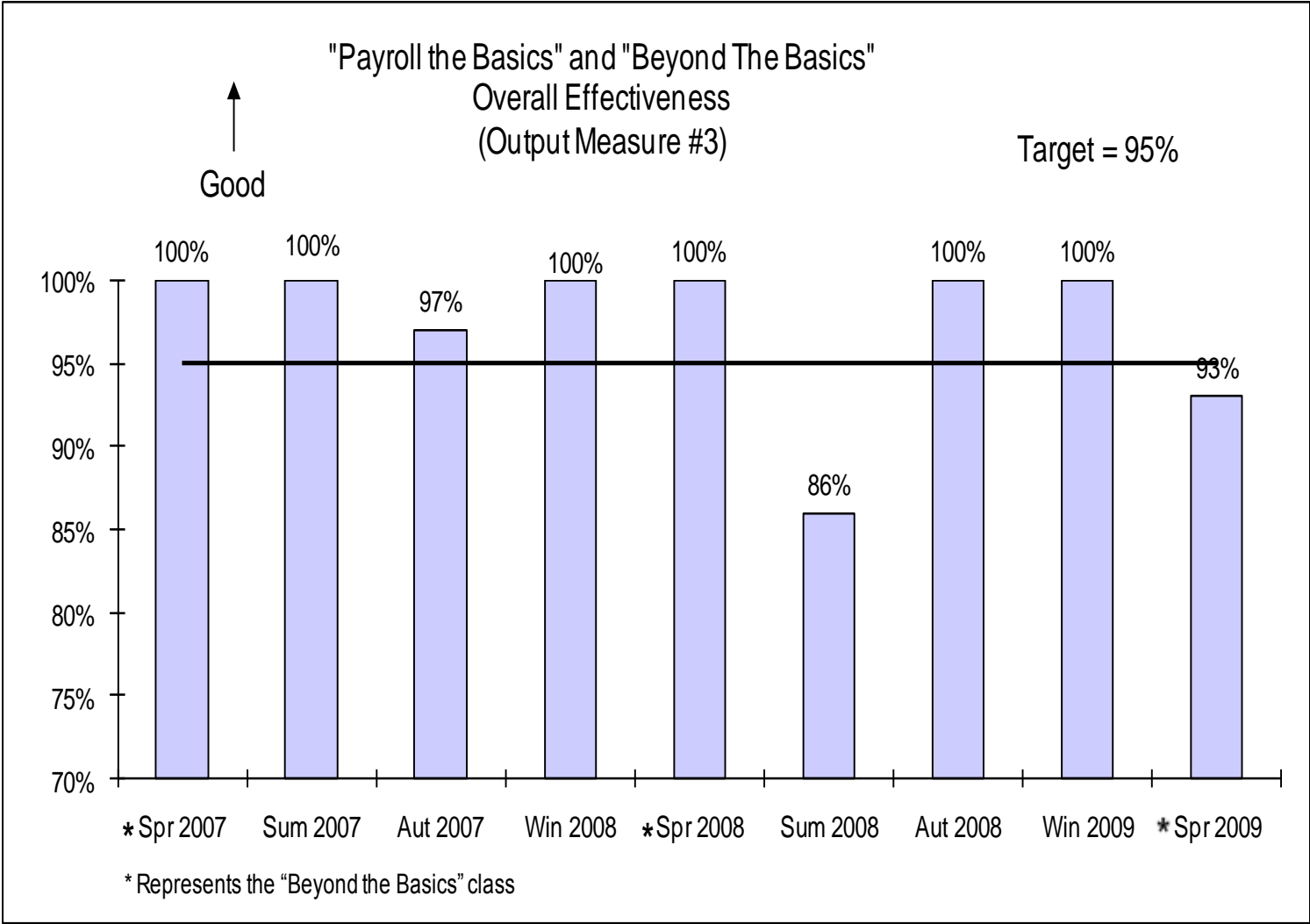
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**Payroll – Operational Performance Dashboard  
June 2009 — Quarter 4 FY 2009 (Apr – Jun 2009)**

Customer Perspective					Financial Perspective				
Process	Measure	Current Output Measure	Target	Gap (Target-Output)	Process	Measure	Current Output Measure	Target	Gap (Target-Output)
Provide Customer Service	1) Effectiveness of the Payroll Coordinator Meetings (Payroll Coordinators' Customer Service Survey)	93% 2008	90%	No Gap	Manage Money	13) Overpayments pre-collections processing not completed in 90 days. (monthly)	7 06/09	5	2
	2) Payroll's Service Effectiveness (Payroll Coordinators' Customer Service Survey)	99% 2008	90%	No Gap		14) % of GL accounts reconciled monthly by due date	72% 06/09	100%	28%
	3) Payroll the Basics and Beyond the Basics overall effectiveness based on POD evaluation (Agree or Strongly agree rating- quarterly measure)	93% 06/09	95%	2%					
	4) Payroll the Basics and Beyond the Basics course materials are clearly organized based on POD evaluation (quarterly measure)	93% 06/09	95%	2%					
Internal Business Perspective					Learning & Growth Perspective				
Process	Measure	Current Output Measure	Target	Gap (Target-Output)	Process	Measure	Current Output Measure	Target	Gap (Target-Output)
Pay People	5) I9s outstanding 14 days after hire date (monthly)	177 06/09	50	127	Develop Staff	15) % of EDPs on file incorporating knowledge worker skills	100% 06/09	100%	No Gap
	6) % of ETRs not Approved by 3pm on Cutoff (monthly average of 2 pay cycles)	10% 06/09	2%	8%		16) Payroll employees knowledge about Payroll Systems (Payroll Coordinators' Customer Service Survey)	96% 2008	95%	No Gap
	7) % of PTRs not Approved by 3pm on Cutoff (monthly average of 2 pay cycles)	10% 06/09	2%	8%		17) Payroll employees knowledge about Payroll Services (Payroll Coordinators' Customer Service Survey)	94% 2008	95%	1%
	8) Number of Visas that are not suspended or updated from the 3 day notice letter (monthly)	1 06/09	0	1					
	9) % of direct deposits processed online (monthly)	81% 06/09	70%	No Gap					
	10) % of W4s processed online (monthly)	41% 06/09	50%	9%					
	11) % of identified Payroll procedures that are documented (quarterly)	8% 06/09	10%	2%					
Manage Money	12) Productivity - % increase over 3-year period	6.7% 2008	5%	No Gap					

# Provide Customer Service – Measure 3



**Definition:**

This graph shows the percentage of class attendees that chose Agree or Strongly Agree on the “Payroll the Basics” and “Beyond the Basics” Class course evaluations. “Payroll the Basics” is a class taught by select Payroll Staff 3 times a year and “Beyond the Basics” is taught once a year in the spring to employees who sign up through Professional and Organizational Development.

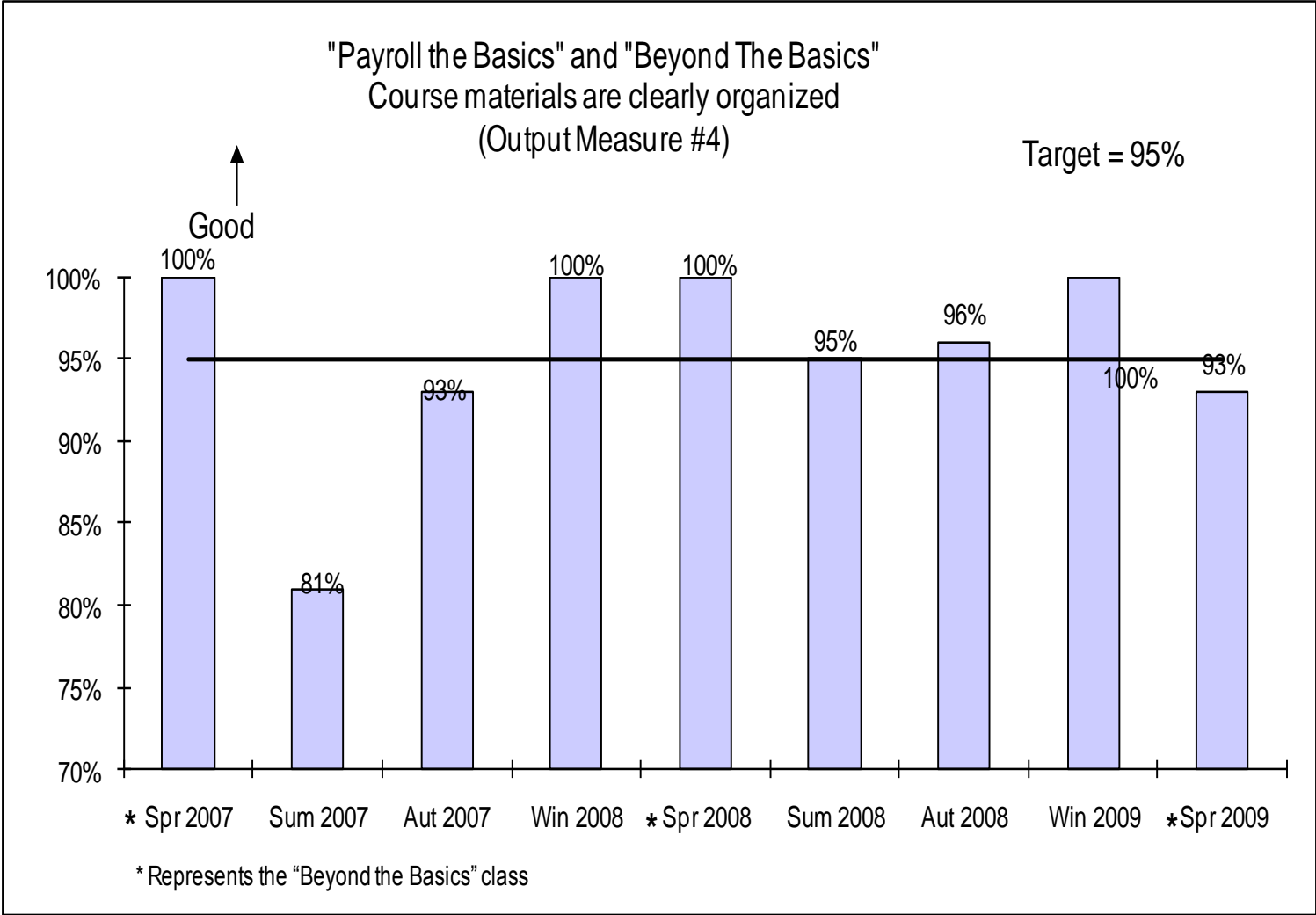
**Analysis:**

22 of the 29 participants submitted an evaluation for the winter 2009 class. We are constantly using feedback from the evaluations to think about new ways to present our information and/or make the class more enjoyable.

**Next Steps:**

We will continue to review evaluations for any comments/suggestions that we may find helpful for the class and to also brainstorm new ideas to make the class a more interactive learning experience.

# Provide Customer Service – Measure 4



**Definition:**

This graph shows the percentage of class attendees that chose Agree or Strongly Agree on the course materials evaluations for the "Payroll the Basics" and "Beyond the Basics" Class. "Payroll the Basics" is a class taught by select Payroll Staff 3 times a year and "Beyond the Basics" is taught once a year in the spring to employees who sign up through Professional and Organizational Development.

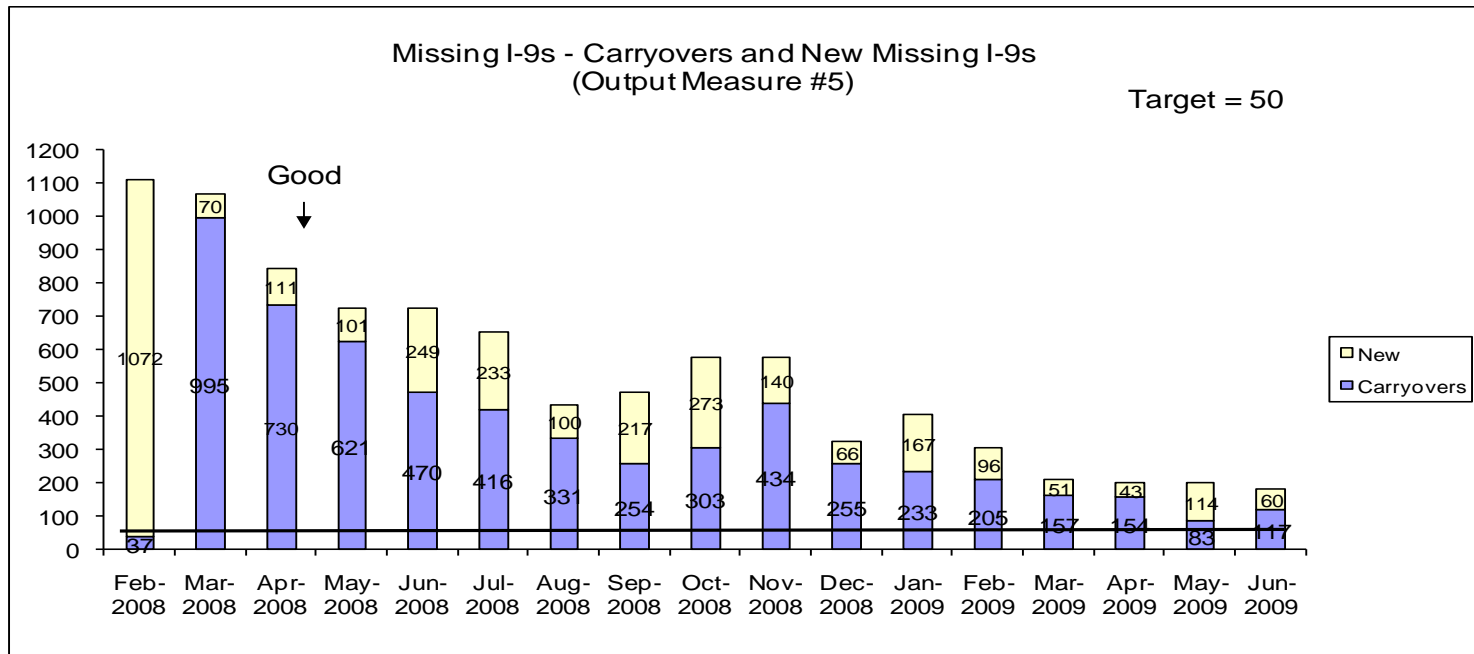
**Analysis:**

22 of the 29 participants submitted an evaluation for the winter 2009 class. The feedback of the quality of the course materials for this class varies, except for the "Beyond the Basics" classes. These classes have consistently rated the class materials high. We are constantly using feedback from the evaluations to make updates to our materials as needed.

**Next Steps:**

We will continue to review and update our materials as needed, read evaluations for comments/suggestions and continue looking at ways to streamline how we present our in-class materials to participants.

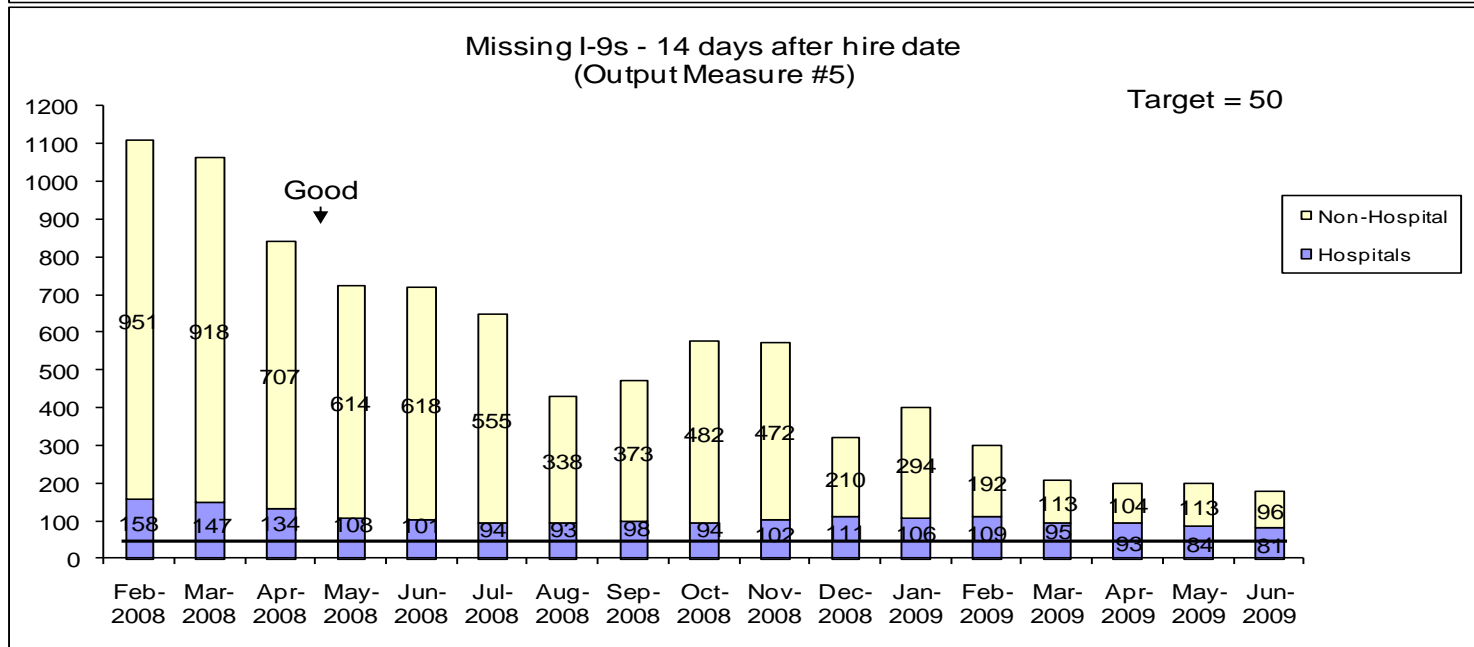
# Pay People – Measure 5



**Definition:**

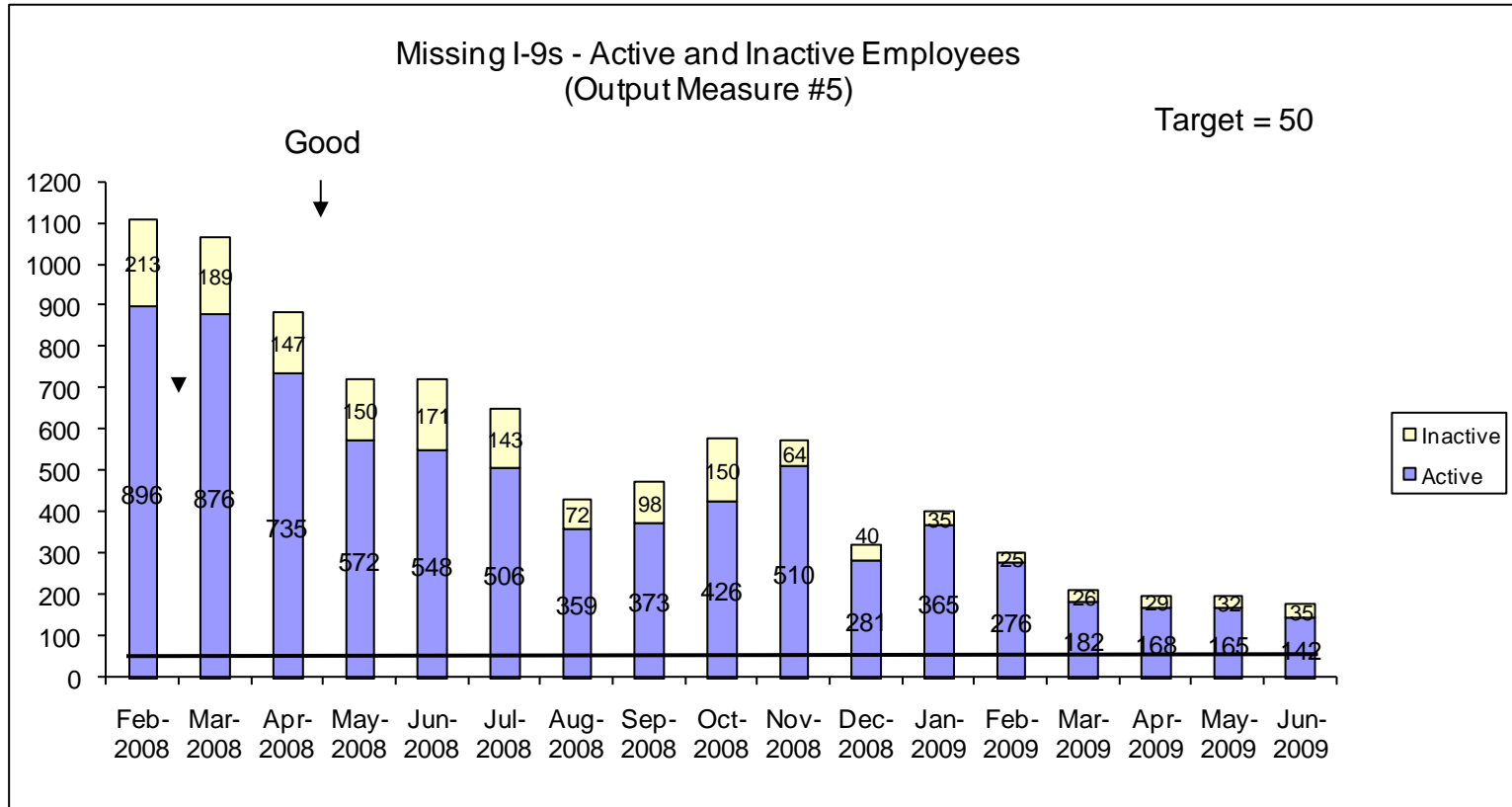
This graph shows the number of employees currently active or inactive in paid appointments that do not have a valid I-9 on file in the Payroll Office. The fines are the same for Citizens and Immigrants as for Non-Resident Aliens.

**Analysis:**

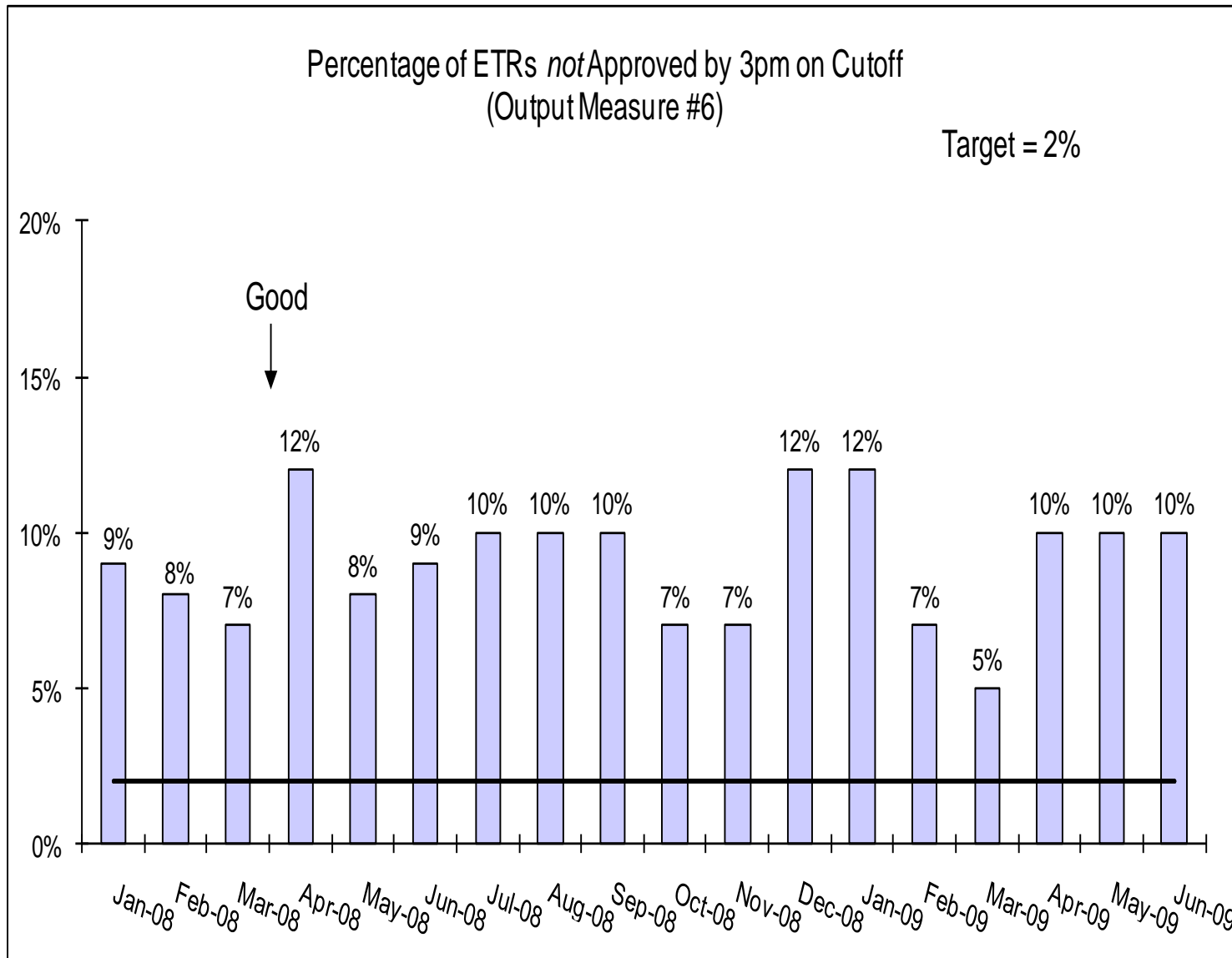


**Next Steps:**

# Pay People – Measure 5



## Pay People – Measure 6



### Definition:

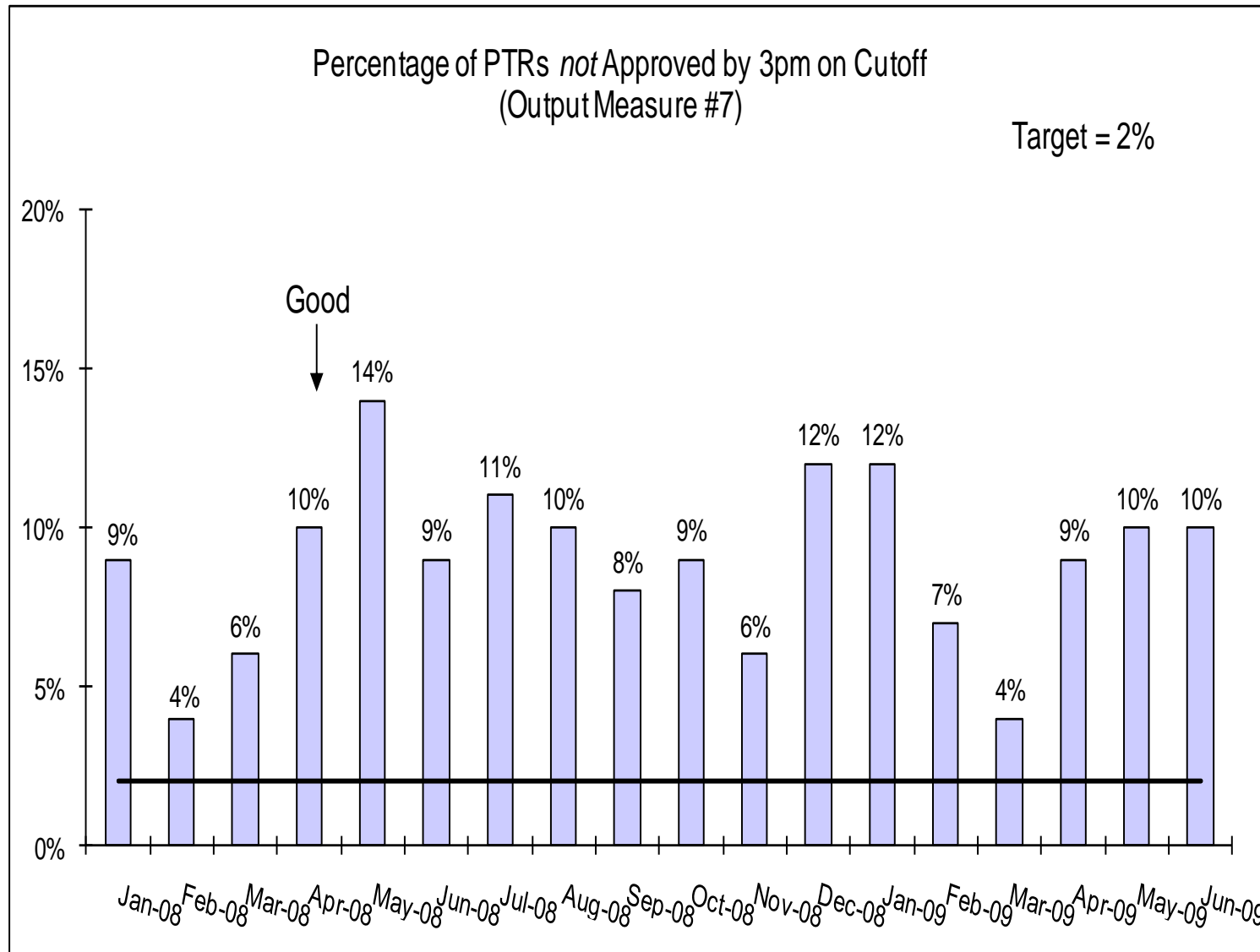
This measure tracks the percentage of Exception Time Reporting (ETRs) that are not approved by 3pm on Cutoff. This is time entry for salaried employees.

### Analysis:

Although we would like to see 100% of campus completed by the 3:00pm deadline, for some departments this is not possible (Hospitals). We have determined after contacting those departments that have not finished that many understand the timing of the systems, 5:00 deadline, some are "waiting for last minute" changes to be made in OPUS, and others simply still working on it and "my approver is in a meeting". Departments have 4 days to complete their time entry. They should not be waiting to the last day to process the majority of their payroll.

### Next Steps:

## Pay People – Measure 7



### Definition:

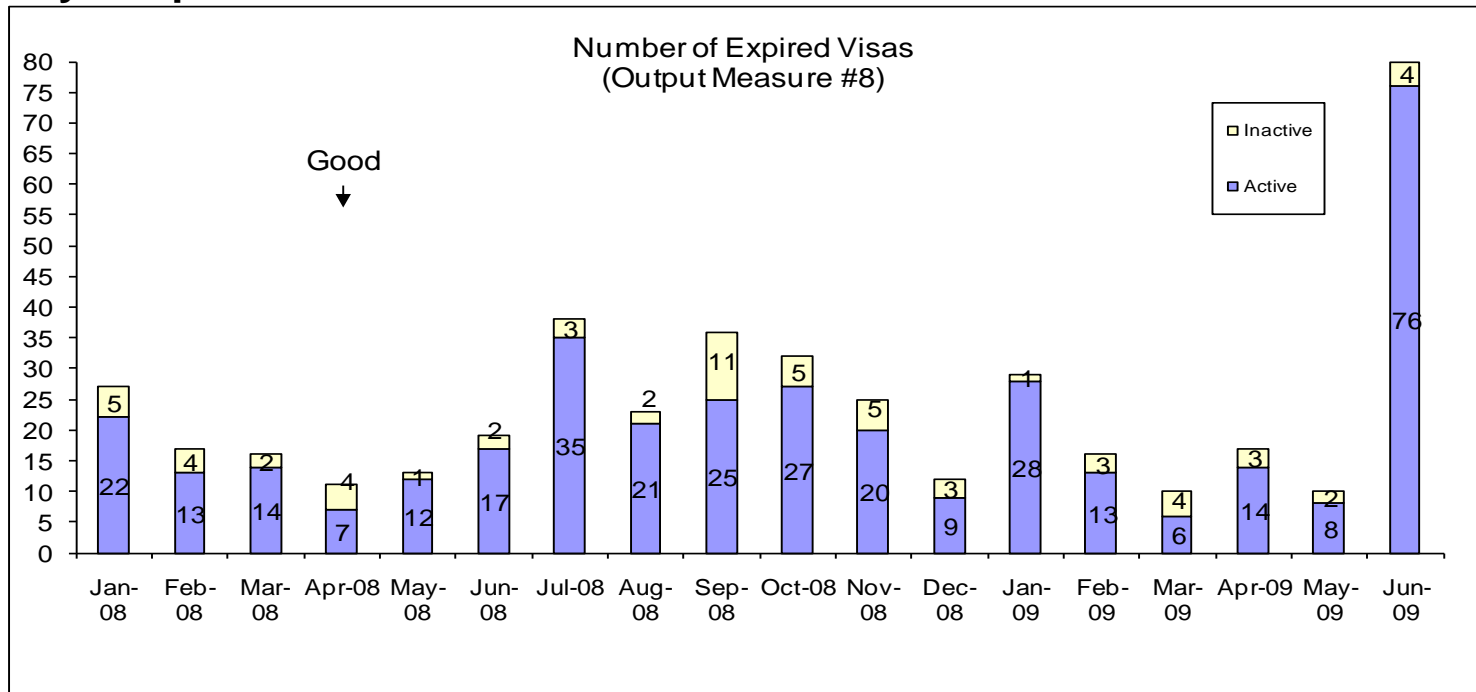
This measure tracks the percentage of Positive Time Reporting (PTRs) that are not approved by 3pm on Cutoff. This is time entry for hourly employees. Same as measure 6, except this is for PTRs.

### Analysis:

Hourly employees are submitting their timesheets late or not submitting them at all, which triggers a backlash to the approval process. Departments are spending more time trying to track down employees or spending too much time checking their Time Entry Report prior to entry in to the PTR. Also, departments are still making late OPUS changes in part because of the start of the new quarter.

### Next Steps:

# Pay People – Measure 8



## Definition:

This is a measure of the number of foreign nationals that have an expired visa work authorization. The effect of not having a valid I-9 on file is a \$40,000 fine per person out of compliance if audited by the Department of Homeland Security.

## Analysis:

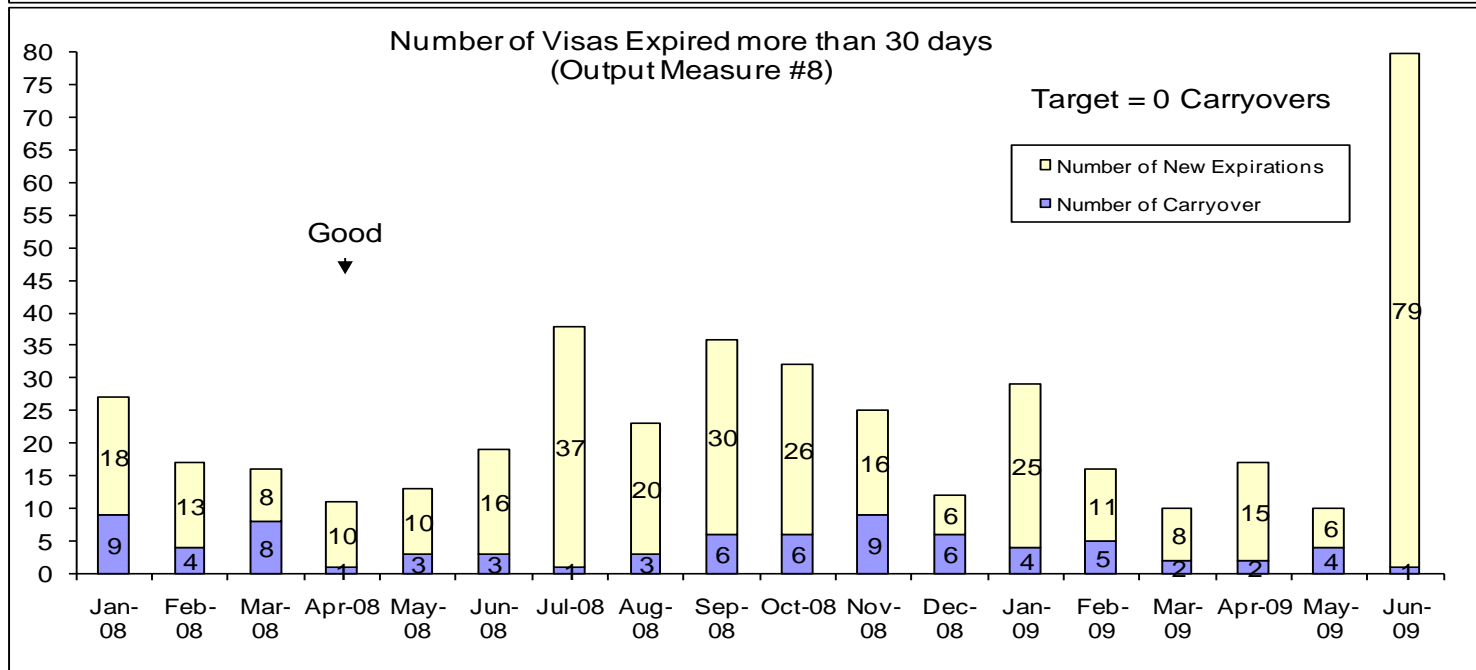
The end of the academic year is June and many work authorizations follow the academic year.

There are approximately **3000** foreign national employees at the university at a given time.  
 # of 90 day notices in June = **103**  
 # of 60 day notices in June = **53**  
 # of 30 day notices in June = **155**

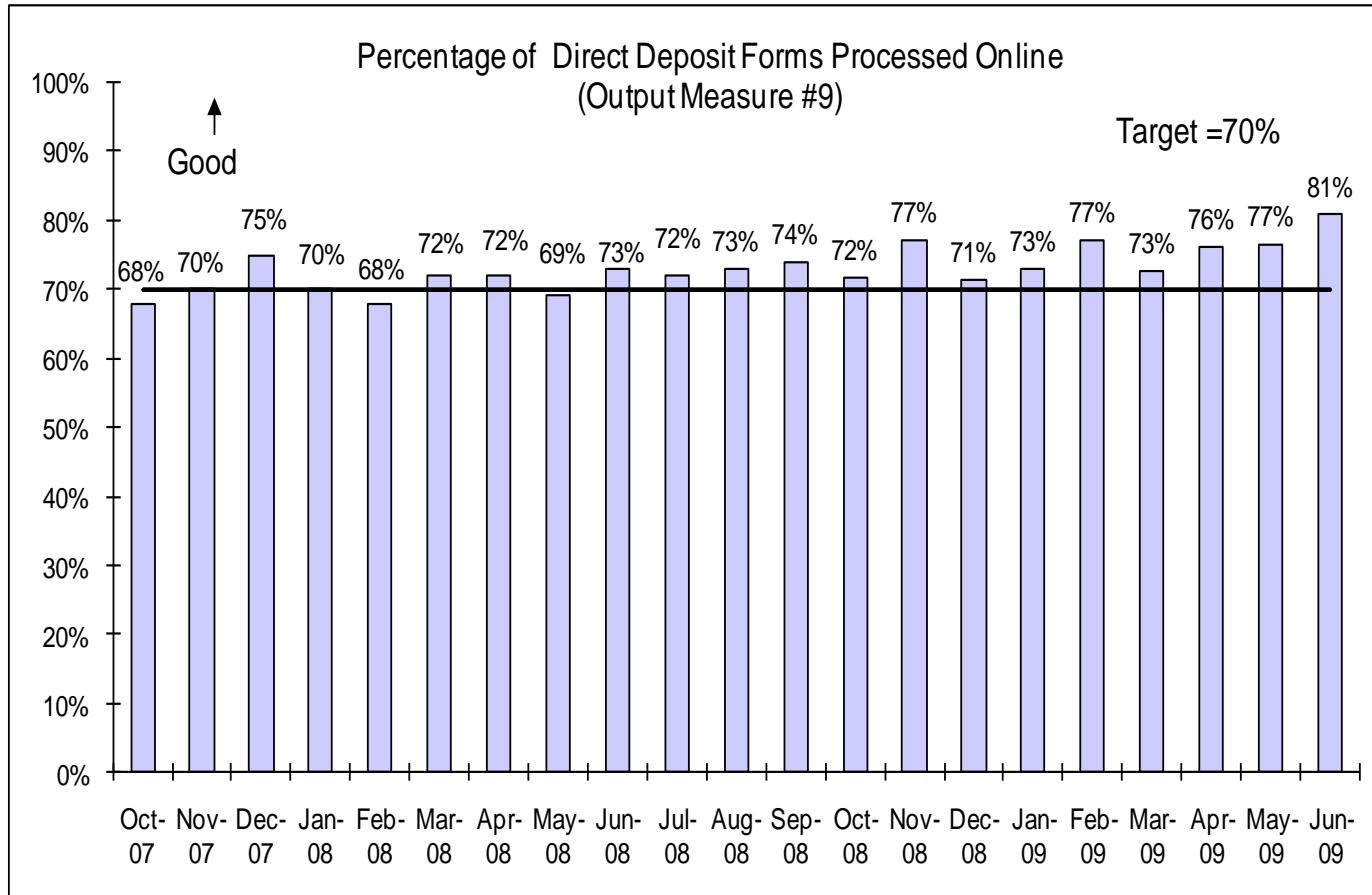
**June 2009:** the number of TN Visas on the expired list = **0**

## Next Steps:

Departments on the carryover list are contacted every month by the Assistant Director.



## Pay People – Measure 9



### Definition:

Direct Deposit starts, stops and changes that are made online in ESS instead of via paper and data entry in the Payroll Office.

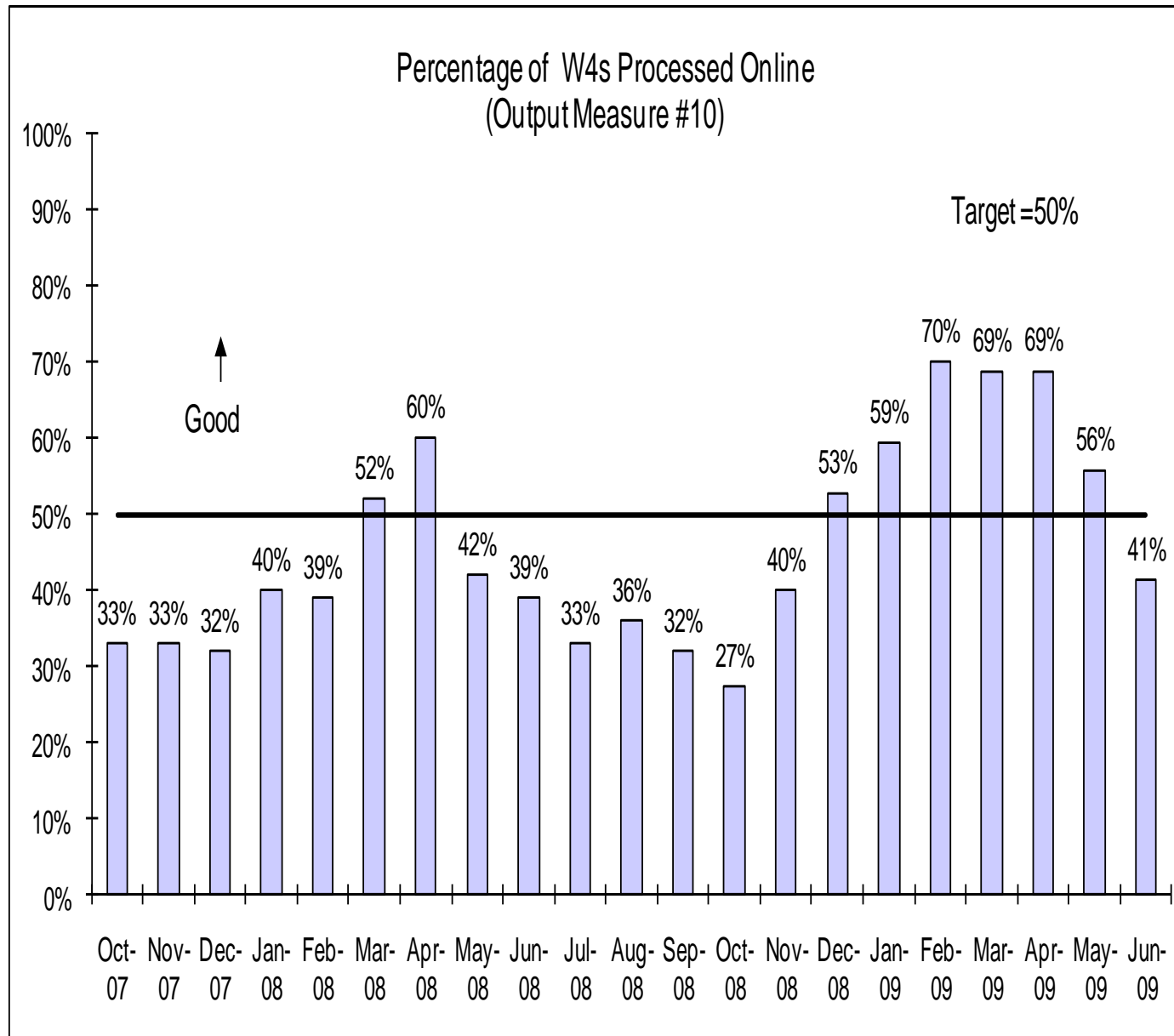
### Analysis:

Apr: Paper=232 Online=741  
 May: Paper=201 Online=658  
 June: Paper=249 Online=1047

The percentage of direct deposit forms processed online has consistently been above 70%.

### Next Steps:

## Pay People – Measure 10



**Definition:**

This measure shows the percentage of W4 changes that are made online in ESS instead of via paper and data entry in the Payroll Office. Online W4 changes are not allowed for Non-resident alien employees.

On average, **90** paper W4s are returned each month as invalid

**Analysis:**

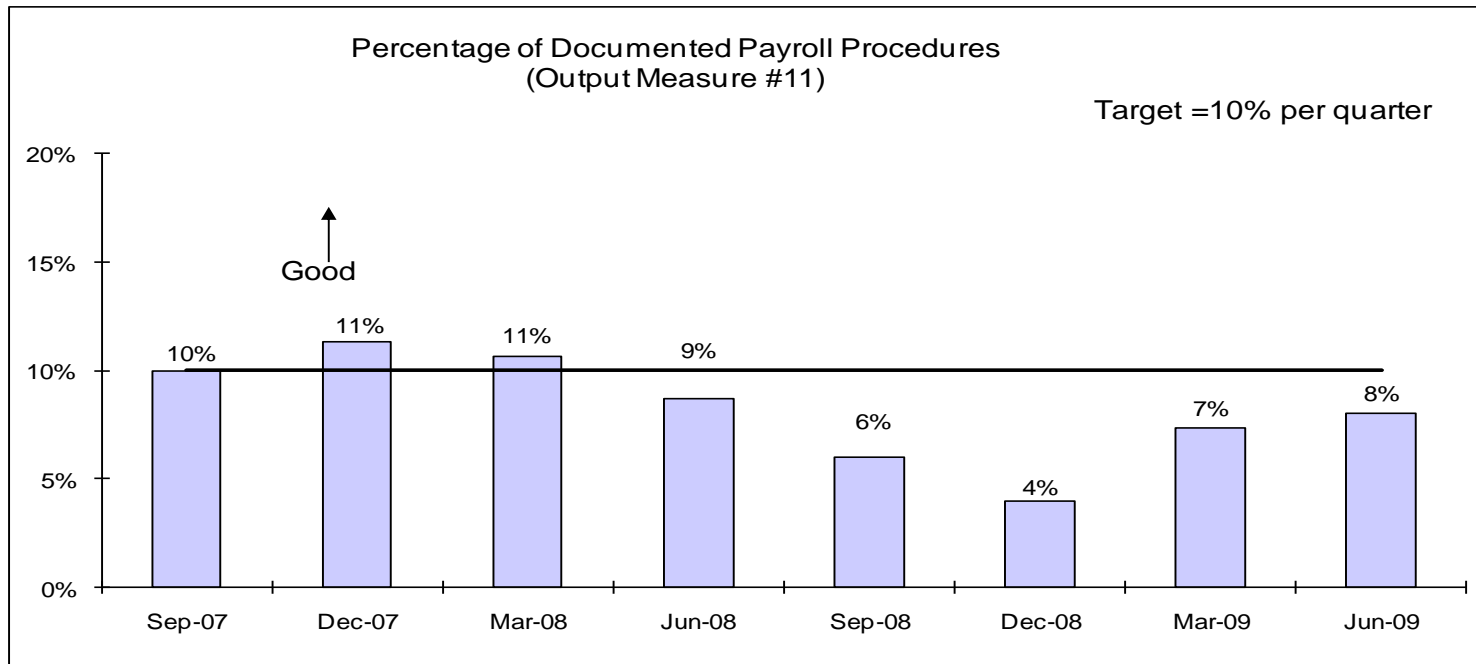
Apr: Paper=**447** Online=**985**  
 May: Paper=**386** Online=**487**  
 Jun: Paper=**749** Online=**529**

There is a clear trend in that departments still have employees fill out the W4 on paper as part of the "new hire" packet. Since that does not require any paperwork from the employee like the direct deposit form does, it appears that employees are more likely to go online after they are in the system to complete a direct deposit.

Online W-2 may have impacted numbers as people went online to pull their tax data they may have made changes to their W-4.

**Next Steps:**

# Pay People – Measure 11

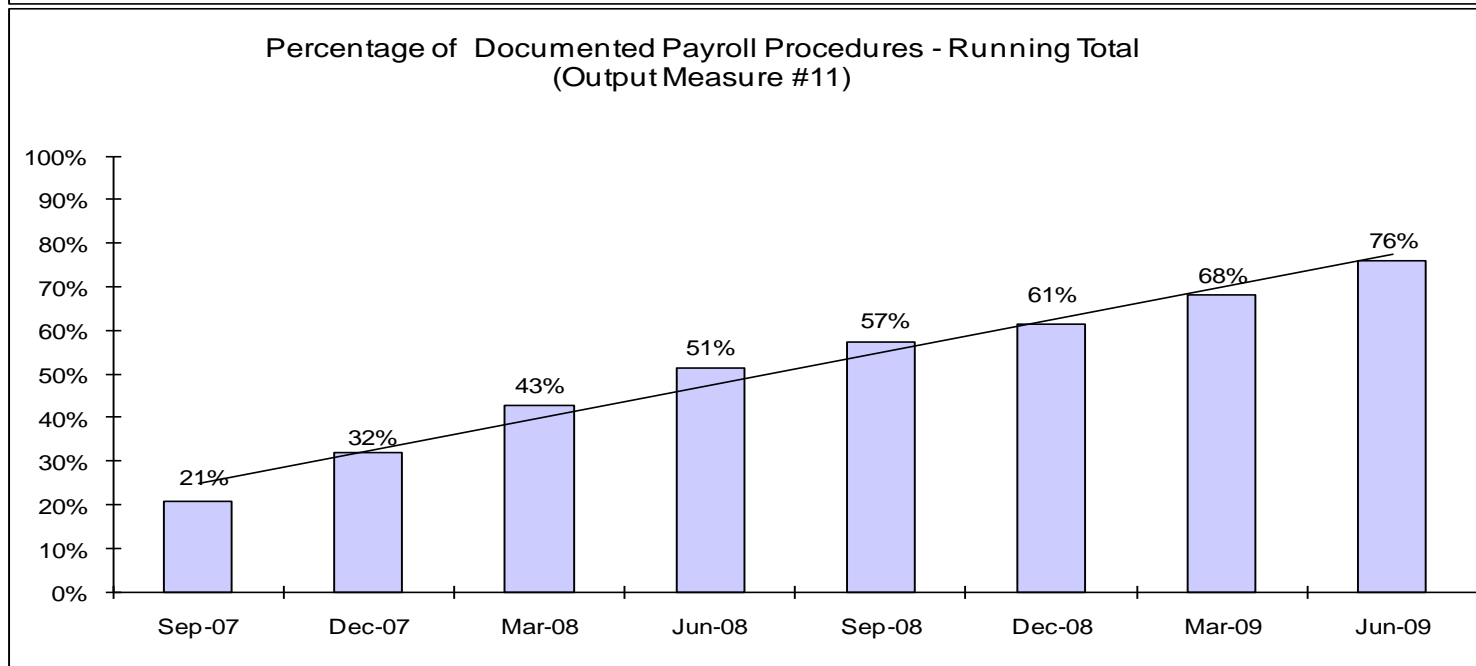


**Definition:**

The purpose of this measure is to keep the department on track as we document all Payroll processes for backup, cross-training and disaster recovery purposes. This also is part of the department’s knowledge worker initiative.

The first graph shows the percentage of identified Payroll processes that are documented per quarter. The second graph shows a running total of procedures documented.

The total number of identified procedures is **150**.



**Analysis:**

The department completed **12** procedures during the quarter Apr-June 2009.

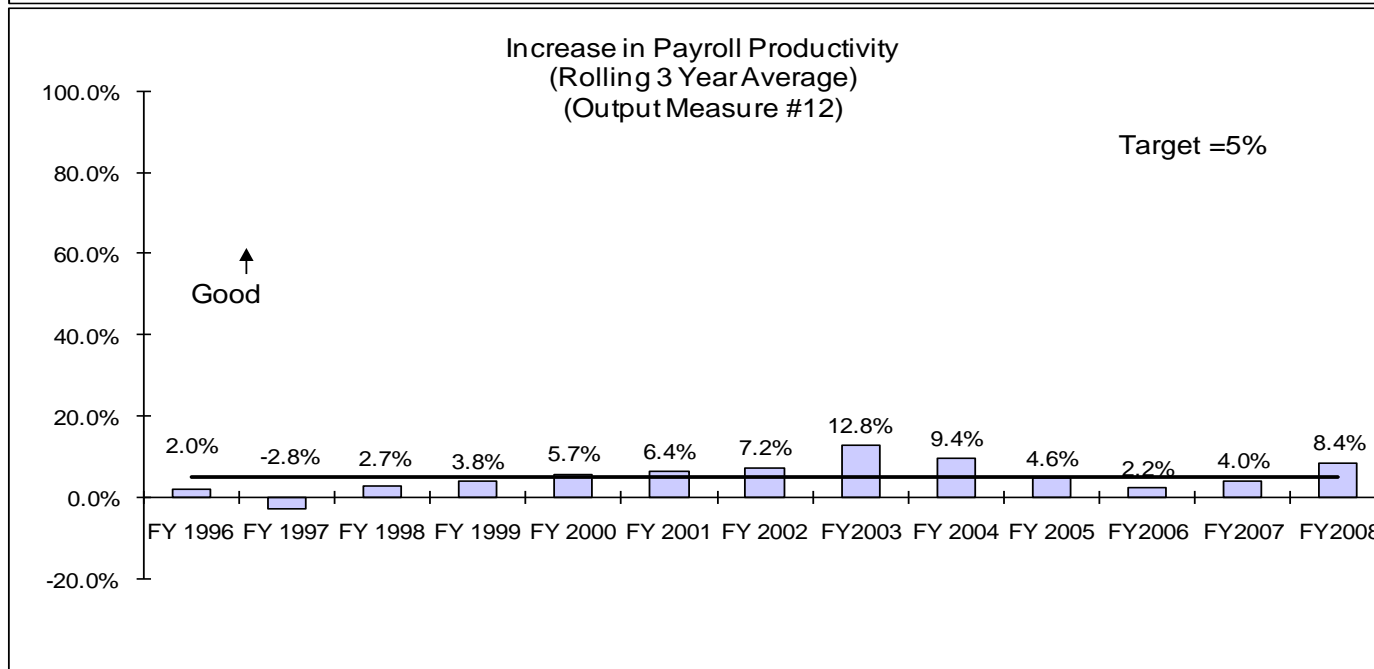
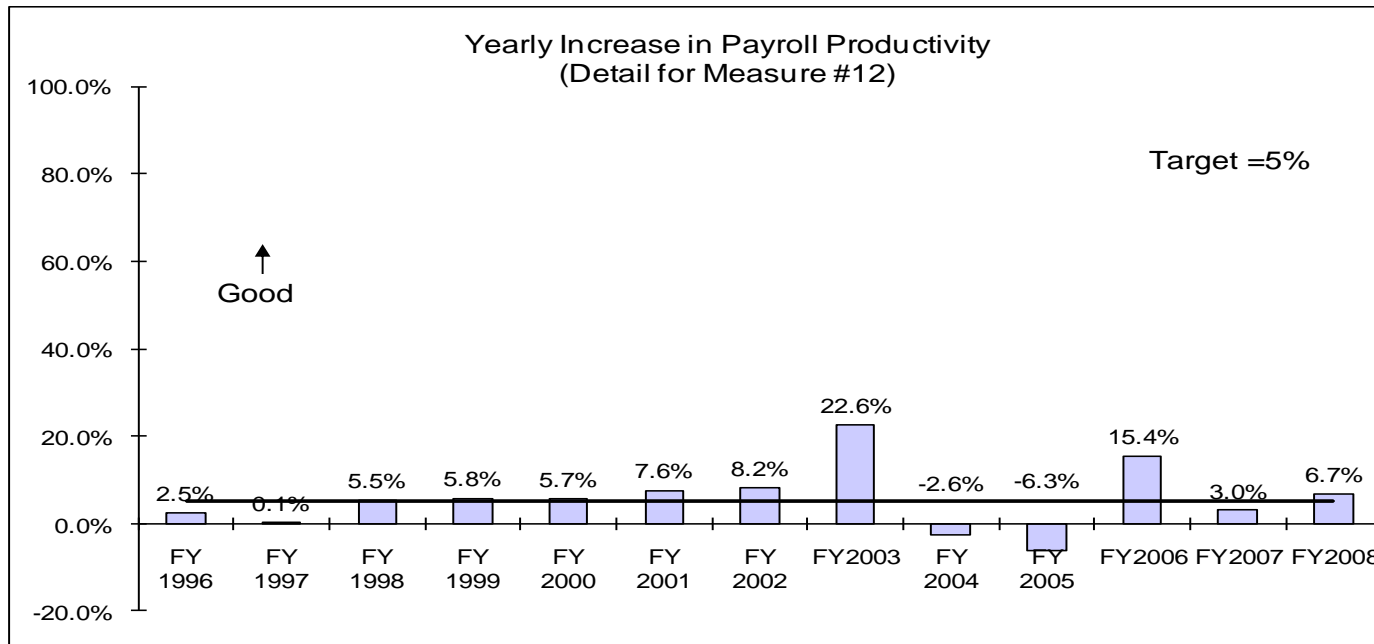
A total of **114** procedures have been completed.

Several procedures remaining are complicated and require hours of work.

**Next Steps:**

Each unit completes an assignment sheet at the beginning of each quarter of the procedures they plan to complete.

# Manage Money – Measure 12



**Definition:**

The Payroll Productivity measure compares the total number of Payroll employees to the total number of employees at the University of Washington.

**Analysis:**

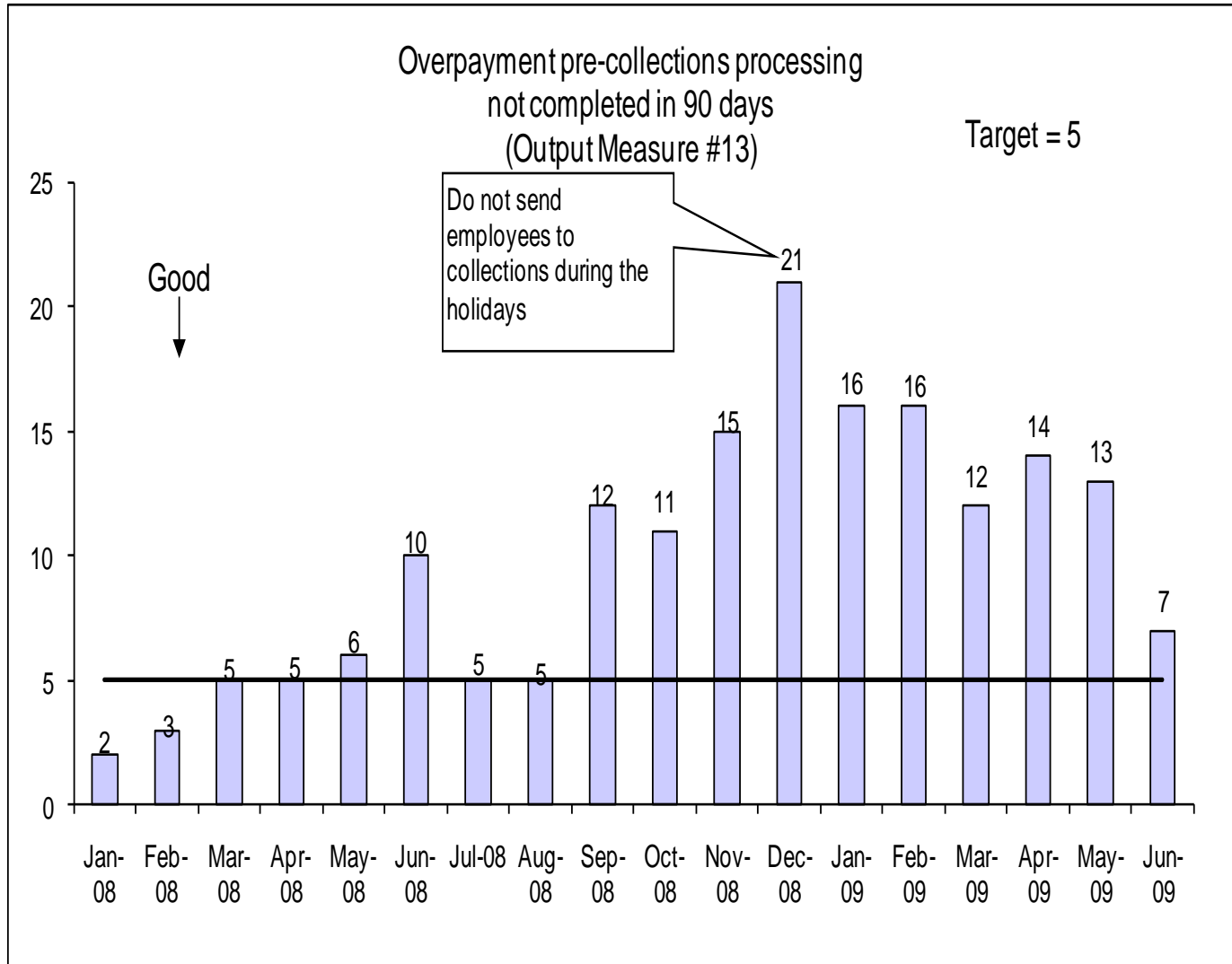
Annual measure based on Payroll's FTE/number of employees paid in our October count.

This number can fluctuate each year based on the number of active employees when calculating the October count.

Payroll has no influence or control over the number of active employee listed in the October count.

**Next Steps:**

## Manage Money – Measure 13



**Definition:**

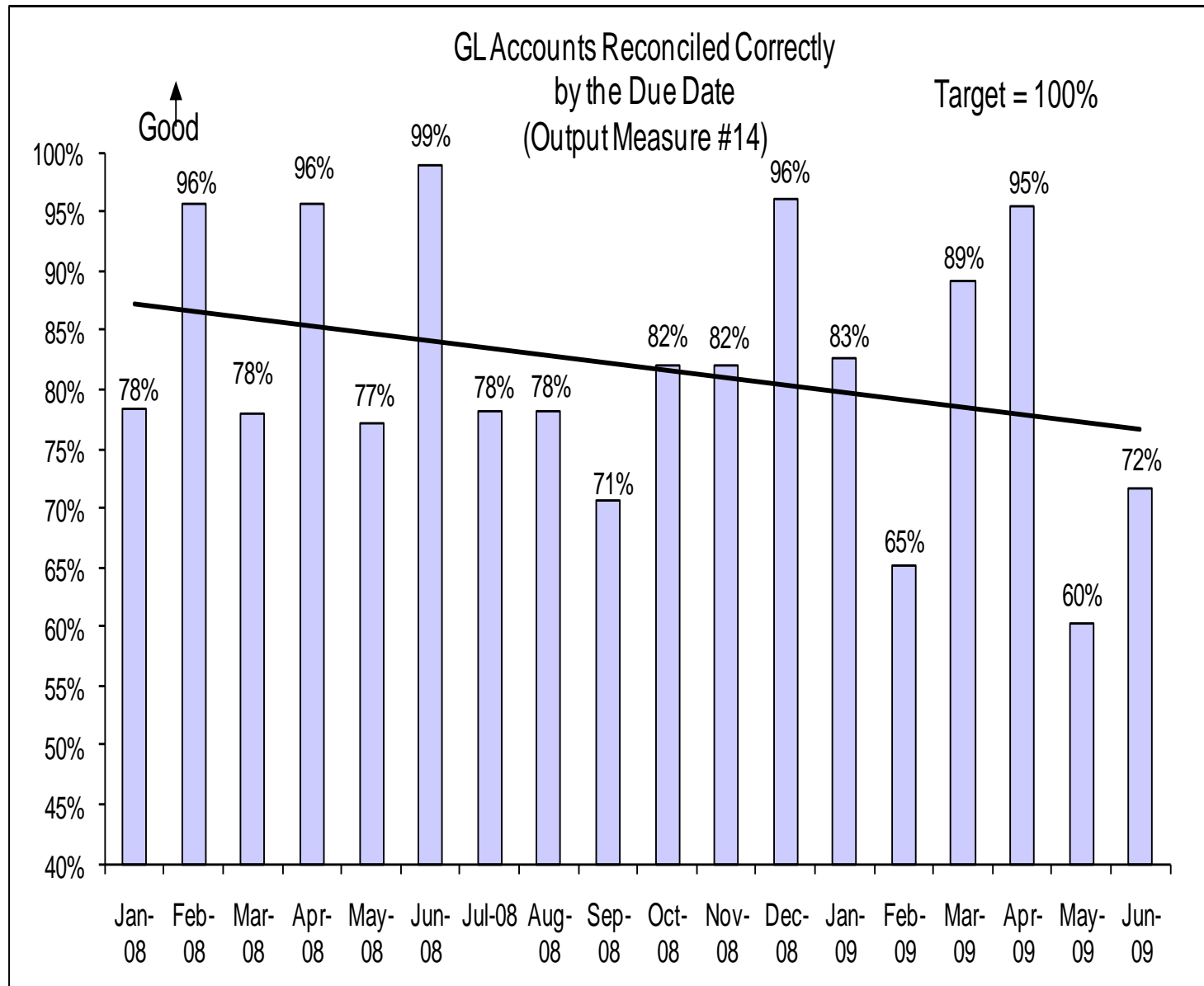
This measure tracks the cycle time for overpayments ultimately sent to an outside collection agency. There is a better chance of recovering the funds if the collection efforts are timely. Total number of outstanding overpayments as of June 30 =  
= Representing Average number of new overpayments each month ~ **109**

**Analysis**

**Separated =**  
**Inactive=**  
**Represents -**

**Next Steps:**

## Manage Money – Measure 14



### Definition:

This is a measure of the percentage of active Payroll Office general ledger accounts that are reconciled accurately by the due date.

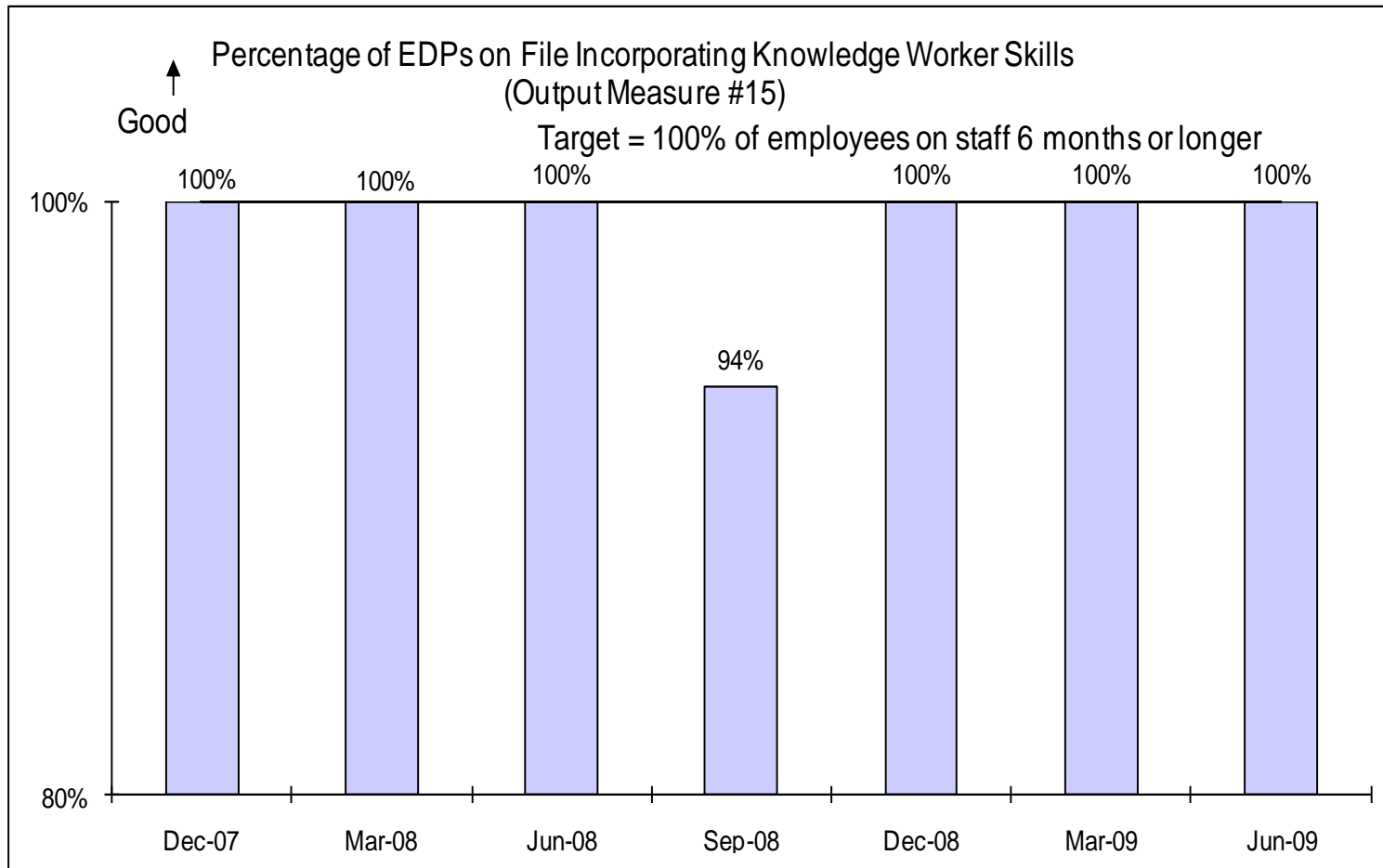
### Analysis:

Total number of Active General Ledger Accounts =

Late General Ledgers are usually turned in within a week of the due date. One late person can impact the numbers significantly.

### Next Steps:

## Develop Staff – Measure 15



**Definition:**

This measure tracks the number of Employee Development Plans turned in to the TAP team that have incorporated Knowledge Worker Skills. Employees that have worked in the Payroll Office for 6 months or longer are tracked.

**Analysis:**

18 out of 18 employees have turned in an EDP that incorporates Knowledge Worker Skills.

**Next Steps:**

Continue to review knowledge worker skills and EDPs with employees every quarter. Supervisors will monitor if employees are taking action on their EDPs.