ELECTRONIC W2 & DIRECT DEPOSIT ENROLLMENT

Jim Corkill, Controller
Sona Baboolal, Payroll Manager

UNIVERSITY OF CALIFORNIA SANTA BARBARA

UCSB
WELCOME to BFS Mini Tune-ups

OBJECTIVE:
Online meetings to provide campus staff with a high level perspective and information on both topics of interest and new/upcoming initiatives and policy updates.

PRINCIPLES:

• Sessions are conducted via Zoom and will last no longer than 30 minutes
• Participants will be muted during the session
• Chat questions can be submitted but priority will be given to questions submitted ahead of time at www.bfs.ucsb.edu/coaching
• The Mini Tune-up website will be updated with session details and information
UCPath

CURRENT

Departments
Payroll

FUTUR

Departments
Payroll
UCPath
Center
Getting Ready for UCPath

Departments

- Promote online Direct Deposit and electronic delivery of W-2 using AYSO
- The campus culture should shift and encourage employees to sign up for payroll direct deposit and online W-2 to ensure security, expediency, and accuracy.
Payroll Administration

Electronic W-2 Adoption

Direct Deposit Adoption

UCSB
Berkeley
Davis
Irvine
Los Angeles
Merced
Riverside
San Diego
San Francisco
Santa Cruz

0%
20%
40%
60%
80%
100%
Direct Deposit Enrollment through AYSO

- More information and instructions: https://www.bfs.ucsb.edu/payroll/employees
- Guided process and instructions for first-time AYSO users: Download PDF
Self-service on the At Your Service Online Website (AYSO)

New users enroll here:
https://atyourserviceonline.ucop.edu/ayso/
Direct Deposit Enrollment

Enroll at the At Your Service Online website:
https://atyourserviceonline.ucop.edu/ayso/
Electronic W-2 Enrollment

Enroll at the At Your Service Online website:
https://atyourserviceonline.ucop.edu/
Questions

Q: I have heard that if a person wants to receive their paycheck as a check not direct deposit, in UCPath their check will be mailed to their home address....on what date will the Check be mailed?

A: UCPath has said at this time the plan is to have the checks mailed so that employee will receive their checks on payday. However, there are delays that can be caused by the U.S. Postal Service.
Questions

Q: For current employees that switch to direct deposit - do we have to submit an update to their vendor ID for their reimbursements to be paid via direct deposit?

A: No, they will be automatically updated.
Q: Conference Services often reimburses a conference that overpays estimated fees by using a form 5 to request a check be cut and mailed to the client. Will that process also go through UCR and thereby take a little longer or will UCSB still cut those checks as they are unrelated to payroll?

A: No, checks will still be processed by Accounts Payable here at UCSB.
Q: For the direct deposit, I thought UCSB had problems with both Washington Mutual and Chase bank because UCSB did not offer enough slots for their account numbers. Has this problem been fixed?

A: This issue has been fixed for all banks including Washington Mutual and Chase Bank.
Q: Is it possible to assign multiple accounts for Direct Deposit?

A: Not at this time. However when the switch is made to UCPath employees will have the option to select up to three different accounts for Direct Deposit.
Questions

Q: When do we anticipate UCPath to go live at UCSB?

A: Some time in 2018. We do not have an exact date at this time.
Questions

Q: What's the best way to determine how many employees are not on direct deposit? Will you be sending out notices to the departments?

A: Each pay period a roster is sent along with the paychecks for each department, you can then determine how many employees are receiving paper checks.
Questions

Q: Is there a way to know who has electronic W-2s?

A: No
Questions

Q: When we switch from At Your Service to the new platform will all the data that we input switch to the new platform?

A: Yes, we believe it will transfer over.
Questions

Q: Is there a form to request electronic W-2? Or is it all handled online?

A: No, all changes can be made through At Your Service Online (AYSO).
Questions

Q: How long does it take for the change to go through? For DD change, as well as W2?

A: It takes 1-2 pay cycles for a direct deposit change to go into effect. Electronic W-2 election is an immediate change.
Questions

Q: What checks, if any, will be handled in payroll, after the switch to UC path?

A: Payroll will not be issuing checks locally once the switch to UCPath occurs.
CLOSING - BFS Mini Tune-ups

NEXT STEPS:

Visit the Mini Tune-ups website to:
• View our session blog updates
• Sign up for future sessions and submit questions
• Submit suggestions for future topics

www.bfs.ucsb.edu/coaching
Thank You!

WRAP UP