February 5, 2020 – Welcome!

COLLEEN DUTTON, CHIEF HUMAN RESOURCES OFFICER
The Office of Human Resources

Mission:
To enable the success of others.

What we do should help others be their best at what they do best.
A Value Added HR Department:

• **Makes it easier for people to get their job done.** Reduces unnecessary roadblocks that derail the flow of teaching, research, and service to students.

• **Proactively partners with schools and divisions on recruitment and retention activities** that will recognize and develop high performers, and in anticipating future staffing needs.

• **Promotes competitive pay and benefits** that are of value to faculty and staff. Provides on going benefits education so employees fully utilize and understand the *total rewards* offered at UTD.

• **Partners with schools and divisions to raise the performance standards across campus** to encourage and support positive employee relations and career development.

• **Develops faculty and staff leaders** to advance the strategic plan of UTD.

• **Serves as a role model for customer service excellence.**
• **Colleen Dutton**  
  – Introduction of HR Staff & CARE Award Winner  
  – General Announcements  
    • Staff Promotion Process for FY21  
    • BRIGHT Leaders Update  
    • Crucial Conversations  
    • You Asked, We Answered ...  

• **Pulin Bhatt**  
  – Update on Microsoft Teams Telephony  

• **Marco Mendoza**  
  – Sexual Misconduct Policy  
  – Responsible Employee Reporting Requirements  

• **Terry Cartwright**  
  – Talent Development Opportunities  

• **Ellen Ammons**  
  – Annual Performance Reviews  

• **Norma Allen**  
  – PA7 Electronic Onboarding  
  – New Tool for Salary Increase Requests  

• **Marita Yancey**  
  – 1095-C Forms  
  – Retirement Plan Limits  
  – Wellness Update
Welcome New HR Staff!

- Diana Alvarado – HR Coordinator
- Dulce Beltran – Employee Immigration Specialist
- Carla Hayes – Administrative Assistant
- Jillian McNally – Talent Development Specialist
CARE Award Winner!

Please join us in congratulating Nora Pena for being a 2020 CARE Award recipient!

Thank you Nora for the outstanding customer service you provide every day to the colleagues of UT Dallas!
General Announcements

➢ Staff Promotion Process for FY21
➢ BRIGHT Leaders Update
➢ Crucial Conversations
➢ You Asked, We Answered...
Microsoft Teams Telephony

Upcoming Milestones:

- February 2020: OIT begins piloting Teams telephony
- March 16, 2020: UTD upgrade to Microsoft Teams (deprecating Skype For Business)
- Late March: Engage Early Adopters to begin Teams Telephony migration
- In the works – Migrating UTD employee emails from UTD servers to Microsoft Exchange Online (cloud based)
- Questions: pbhatt@utdallas.edu
Microsoft Teams Telephony

Skype For Business Upgrade to Teams
UTD Upgrade Day – March 16th

What’s Happening?
• You have Teams now – Please start using it
• Sign-In to Skype For Business (S4B) at UTD will redirect to Teams
• S4B Meetings will remain in S4B until re-scheduled in Teams
• Previous S4B Conversations will stay in Outlook folder
• No impact to Skype personal app (non-business client)

Benefits
• Persistent Chat – Take chats with you!
• Enhanced Collaboration Features
• Improved Meeting Experience
• Improved Mobile Experience (iOS and Android)

Training is available now! Register at o365.utdallas.edu.
OIT Pilot of Teams Telephony

What’s Happening?
• Phone numbers for OIT staff will be moved to Teams and will ring in the client and on Teams-enabled phones/headsets
• Pilot users will be provided with a Teams-enabled phone or headsets and asked to provide feedback
• Call Quality Data will be monitored during this pilot

Benefits
• Consolidated interface for IM, Phone, Collaboration
• Better 911 Compliance & Dispatch Accuracy
• Duo Protection on Email & IM
Marco Mendoza, Senior Director of Institutional Equity and Title IX Coordinator

INSTITUTIONAL COMPLIANCE, EQUITY, AND TITLE IX INITIATIVES
It is the responsibility of every supervisor, administrator, and University official to promptly report potential incidents of discrimination and harassment to ICET.

Responsible Employees include all administrators, faculty, supervisory staff, resident life directors and advisors, and graduate teaching assistants, except any employee with confidentiality obligations.

Every member of the UTD community is encouraged to report incidents of discrimination, harassment, or sexual misconduct.
Every State of Texas employee, who works in higher education, must report to the Title IX Coordinator information reasonably believed to be:

- Sexual Harassment,
- Dating violence,
- Stalking, and
- Sexual assault.

Reporting is NOT required if you receive a disclosure at a public awareness event sponsored by UT Dallas or a student organization (speakers reflecting on personal experience).

This mandatory reporting obligation applies to all employees, except:

- victims of the offense,
- designated Confidential Employees (Counseling & Health Center providers), and
- individuals whose employment is conditioned upon student status (such as student workers).
Employees designated by UT Dallas as persons with whom students may speak confidentially concerning

- Sexual Harassment,
- Sexual Assault,
- Dating Violence,
- Stalking,
- or who receive information regarding such an incident under circumstances that render the employee's communications confidential or privileged under other law (such as licensed counselors or medical doctors working with patients).

SB 212 requires Confidential Employees report only the type of incident reported to the Title IX Coordinator and may not include any information that would violate a student's expectation of privacy.
Responsible Employee Report

• Required information:
  – All information concerning the incident known to the reporting person that is relevant to the investigation and, if applicable, redress of the incident, including whether an alleged victim has expressed a desire for confidentiality in reporting the incident.

• Submit Report to:
  https://www.utdallas.edu/institutional-initiatives/title-ix/complaints/

• Email: TitleIXCoordinator@utdallas.edu
• If an employee fails to make a required report or makes a false report, the law requires that the employee be terminated.

• Individuals who are required to report
  – Sexual Harassment,
  – Sexual Assault,
  – Dating Violence,
  – or Stalking,
  – and who knowingly fail to make the report or who with the intent to harm or deceive knowingly make a false report commit a **Class B Misdemeanor**. Further, it is a **Class A Misdemeanor** if it is shown during the criminal trial of the Class B Misdemeanor offense that the employee *deliberately tried to conceal* the incident that was required to be reported to the Title IX Coordinator or a Deputy Title IX Coordinator.
Responsible Employees should make every effort to ensure that students and other employees understand:

- The Responsible Employee’s obligation to report all information regarding possible sexual misconduct, including names of individuals involved to the Title IX Coordinator;
- A complainant’s option to request that the school maintain his or her confidentiality; and
- The option to share information confidentially with confidential resources such as a counselor or healthcare professional.
Responsible Employee:

• “It is necessary for me to inform you that I have been designated as a Responsible Employee at UT Dallas. This means that I will have to share this information with the Title IX Coordinator. It is essential for the university to provide the support you need to be safe from harm. Please know that this information will be shared only on a need to know basis and that I am here to help.”

• “I appreciate your willingness to share this information with me. Please know that I am here to help in any way that I can. If you would like to seek assistance from the University, I will help you connect with the Title IX Coordinator, so they can advise you of rights and resources related to this matter. It is important you understand that while your privacy is important, I cannot promise to keep what you share with me confidential. If you are still comfortable speaking with me, I am here to listen. If not, please let me help you connect with the University’s confidential resource at the Counseling Center. Above all, please know that the University takes this matter seriously and wants to help.”
• Retaliation against any person bringing a discrimination complaint, participating in an investigation or disciplinary process of such a complaint, or opposing any unlawful practice violates University policy and is illegal.
Not less than once every three months, the Title IX coordinator of a postsecondary educational institution shall submit to the institution's chief executive officer a written report on the reports received under Section 51.252, including information regarding:

– the investigation of those reports;
– the disposition, if any, of any disciplinary processes arising from those reports; and
– the reports for which the institution determined not to initiate a disciplinary process, if any.

At least once during each fall or spring semester, the chief executive officer of a postsecondary educational institution shall submit to the institution's governing body and post on the institution's website a report concerning the reports received under Section 51.252. The report:

– may not identify any person; and
– must include:
  • the number of reports received,
  • the number of investigations conducted as a result of those reports;
  • the disposition, if any, of any disciplinary processes arising from those reports;
  • the number of those reports for which the institution determined not to initiate a disciplinary process, if any;
  • and any disciplinary actions taken under Section 51.255.
Contacts in the Case of Sexual Misconduct

- Marco Mendoza, Title IX Coordinator
  TitleIXCoordinator@utdallas.edu or 972-883-2306
- UTD Police
  911 or 972-883-2222 (non-emergency)
- For additional resources, visit: utdallas.edu/institutional-initiatives/title-ix/resources/.

Confidential Resources
- UTD Student Counseling Center
  972-883-2575
  After hours helpline: 972-UTD-TALK (883-8255)
- UTD Student Health Center
  972-883-2747
- Employee Assistance Program (EAP)
  214-648-5330
- Dallas Area Rape Crisis Center
  24-hour crisis hotline: 972-641-7273
- Turning Point Rape Crisis Center
  24-hour crisis hotline: 1-800-886-7273
Questions?

Marco Mendoza, Senior Director of Institutional Equity and Title IX Coordinator

Email:
Sexual Misconduct: TitleIXCoordinator@utdallas.edu
Nondiscrimination: InstitutionalEquity@utdallas.edu
Accessibility: ADACoordinator@utdallas.edu

Location: Synergy Park North (SPN), Ste. 2.720

Web: https://www.utdallas.edu/institutional-initiatives/

SB212: https://legiscan.com/TX/text/SB212/id/2025353
TALENT DEVELOPMENT

Terry Cartwright, Talent Development Manager
Admin U has just started but there is still room to join this cohort!

Other Talent Development Opportunities

- *Emotional Intelligence Series* begins February 11
- *Office Etiquette: The Platinum Rule* scheduled on March 4
- *Dignity and Respect Series* begins March 5
EMPLOYEE RELATIONS

Ellen Ammons, Employee Relations Lead Manager

EMPLOYEE RELATIONS
• Notice sent January 30, 2020

• Common deadline - May 31, 2020 for Annual and Probationary appraisals

• Submit appraisals via:
  – Box account (primary)
    • Box accounts have been set up for each school and division
  – Email to appraisals@utdallas.edu (secondary)

• Karen Casey (ER Specialist I) and Diana Alvarado (HR Coordinator II) will manage the process
Equifax Employee Online I-9 Portal

Welcome to the UT Dallas I-9 Portal!

To begin, enter your location. Select Human Resources if you are not a student employee. Please select Student Career Center if you are a student employee.

This information is only used to identify your account and it is protected by industry standard SSL encryption.

*required fields

LOCATION* 
CONTINUE

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Privacy Policy | Terms of Use
PeopleAdmin (PA7) Employee Electronic Onboarding Module

<table>
<thead>
<tr>
<th>TASK</th>
<th>RELATED USER</th>
<th>CHECKLIST</th>
<th>DUE DATE</th>
<th>DELETE</th>
<th>ACTIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Hire Onboarding Instructions</td>
<td>Krispie Bacon</td>
<td>1_Employee Onboarding</td>
<td>02/01/2020</td>
<td></td>
<td>VIEW</td>
</tr>
<tr>
<td>Section 1 of I-9 (Equifax)</td>
<td>Krispie Bacon</td>
<td>1_Employee Onboarding</td>
<td>02/01/2020</td>
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<td>VIEW</td>
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<tr>
<td>Personal Data Form</td>
<td>Krispie Bacon</td>
<td>1_Employee Onboarding</td>
<td>02/01/2020</td>
<td></td>
<td>VIEW</td>
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<tr>
<td>Day One Acknowledgement Form</td>
<td>Krispie Bacon</td>
<td>1_Employee Onboarding</td>
<td>02/01/2020</td>
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<td>VIEW</td>
</tr>
<tr>
<td>Intellectual Property Agreement</td>
<td>Krispie Bacon</td>
<td>1_Employee Onboarding</td>
<td>02/01/2020</td>
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<td>VIEW</td>
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<tr>
<td>Selective Service Registration Verification Form</td>
<td>Krispie Bacon</td>
<td>1_Employee Onboarding</td>
<td>02/01/2020</td>
<td></td>
<td>VIEW</td>
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<tr>
<td>Voluntary Self-ID - Gender/Race/Ethnicity</td>
<td>Krispie Bacon</td>
<td>1_Employee Onboarding</td>
<td>02/01/2020</td>
<td></td>
<td>VIEW</td>
</tr>
<tr>
<td>Voluntary Self-ID - Veteran</td>
<td>Krispie Bacon</td>
<td>1_Employee Onboarding</td>
<td>02/01/2020</td>
<td></td>
<td>VIEW</td>
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<tr>
<td>Voluntary Self-ID - Disability</td>
<td>Krispie Bacon</td>
<td>1_Employee Onboarding</td>
<td>02/01/2020</td>
<td></td>
<td>VIEW</td>
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<tr>
<td>Benefits &amp; Retirement Eligibility and ACA Notice Acknowledgement</td>
<td>Krispie Bacon</td>
<td>1_Employee Onboarding</td>
<td>02/01/2020</td>
<td></td>
<td>VIEW</td>
</tr>
<tr>
<td>Prior State Service Form (Updated)</td>
<td>Krispie Bacon</td>
<td>1_Employee Onboarding</td>
<td>02/01/2020</td>
<td></td>
<td>VIEW</td>
</tr>
<tr>
<td>Foreign National Tax Compliance Process (Download and Print)</td>
<td>Krispie Bacon</td>
<td>1_Employee Onboarding</td>
<td>02/01/2020</td>
<td></td>
<td>VIEW</td>
</tr>
</tbody>
</table>
NEW ONLINE DATABASE TO SUBMIT FY21 STAFF SALARY INCREASE REQUESTS

The link to access the **FY21 Staff Salary Increase Requests database** will be sent out by the end of the week to the designated department contacts. All requests must be submitted by **Friday, February 28, 2020**.

Login Credentials:

*Username* - your username will be your NetID@utdallas.edu (e.g. *nxa190123@utdallas.edu*)

*Password* - the first time you access the system, you will need to click on **Password Recovery** to set up a password. (Note: The password recovery email may go to your junk folder.)

What should be entered into the database:

- **Merit over 7%** - Merit increases that are less than 7% only require Dean/VP approval and should **not** be added to this database.

- **Promotions or Reclassifications** - to promote a staff member to a higher-level position **OR** to reclassify a staff member's current position. A completed PRR, organization chart, and a copy of the staff member's current resume much be attached for HR review.

- **Market Adjustments** - to request an increase to a staff member's salary due to external market data for the position. HR will review to determine the actual market salary, conduct an internal equity review and will make a recommendation as to whether a market adjustment is warranted.

- **Equity Adjustments** – to request a review for an adjustment due to possible salary inequities with similar internal positions. HR will review and make a recommendation as to whether an equity adjustment is warranted.
Marita Yancey, Senior Director of Benefits and Wellness Program

BENEFITS & WELLNESS PROGRAM
What is a Form 1095-C?

- Form 1095-C is an IRS tax form reporting information about an employee’s and dependent(s) health coverage as applicable (Benefits W-2).

Who receives a Form 1095-C?

- Employees & Retirees who were enrolled in the UT Medical Plan or if you worked an average of 30 hours or more per week in 2019.

Do I need the Form 1095-C to file my taxes?

- No, but it’s important to keep it in your personal records in the event you were ever audited by the IRS.

Do Graduate Students enrolled in SHIP receive a Form 1095-C?

- They will receive a 1095-B directly from BCBS.
Review your Form 1095-C and email benefits@utdallas.edu if you see any errors.
How do I access my Form 1095C?

- If you provided consent to receive your form 1095-C electronically in 2017, 2018, or before the deadline of 1/16/2020, you can view it through Galaxy under Staff Tools. Do not print the prior years.
- The 2019 electronic form are now available. Please do not print the prior years.

- If you did not provide consent for an electronic copy, the forms will be mailed by on or before January 31, 2020 by an outside vendor from Illinois.
2020 Retirement Plan Limits

IRS Increases for 2020 Voluntary Retirement Plans

- Also available via the UTD HR page under Benefits, Current Employees, Retirement Programs, and UT Retirement Savings Limits

<table>
<thead>
<tr>
<th>UT Saver Voluntary Programs</th>
<th>UT Saver TSA</th>
<th>UT Saver DCP</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Eligibility</strong></td>
<td>All Employees</td>
<td>All Employees</td>
</tr>
<tr>
<td><strong>Employee Contribution</strong></td>
<td>Pre-tax dollars</td>
<td>After-tax dollars</td>
</tr>
<tr>
<td><strong>Employer Contribution</strong></td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td><strong>Employee Withdrawals</strong></td>
<td>Taxable when withdrawn</td>
<td>Tax free when withdrawn as a &quot;qualified&quot; distribution</td>
</tr>
<tr>
<td><strong>General Contribution Limits</strong></td>
<td>$19,500 IRS maximum (2020) for both traditional and Roth sources. (Each dollar of a Roth contribution reduces the amount that can be contributed pretax, and vice versa.)</td>
<td>$19,500 IRS maximum (2020)</td>
</tr>
<tr>
<td><strong>Over age 50 catch-up contribution</strong></td>
<td>$6,500 combined with Roth</td>
<td>$6,500 combined with Traditional</td>
</tr>
<tr>
<td><strong>15-year catch-up contribution</strong></td>
<td>$3,000 combined with Roth ($15,000 lifetime max)</td>
<td>$3,000 combined with Roth ($15,000 lifetime max)</td>
</tr>
<tr>
<td><strong>Three years prior to retirement catch-up (special catch-up)</strong></td>
<td>N/A</td>
<td>Up to $19,500 (may not be used simultaneously with age 50 catch-up)</td>
</tr>
<tr>
<td><strong>Distributions Upon Separation of Employment</strong></td>
<td>Distributions made prior to age 59 ½ will be subject to ordinary income tax and a possible 10% penalty</td>
<td>&quot;Nonqualified&quot; distributions made prior to age 59 ½ will be subject to ordinary income tax and possibly a 10% penalty</td>
</tr>
</tbody>
</table>

* Contribution limits shown are IRS maximums for 2020. The 2019 limit was $19,000 and the 2019 age 50 catch up was $6,000.

** A "qualified" distribution occurs when the Roth account has been in place for five taxable years (from the year of first contribution) and one of the following events has occurred: (1) attainment of age 59 ½; (2) disability; or (3) death. Contribution limits may vary based on income, years of service, previous deferrals, and other factors. Contact your Benefits Office for a calculation of your personal contribution limit for each voluntary program.
BCBS Website Updates

• Blue Cross Blue Shield did a massive computer update, that has required some members to re-register to access their online BCBS member portal. If you try to login and your password does not work, you may be one of the impacted members. To resolve, simply click on “Register now” to regain access. If you continue to experience difficulties, please contact BCBS at (866)882-2034.
Wellness Update

• **Right This Weigh** – Live Healthy Challenge
  – Challenge Dates: January 27 – March 8
  – Earn 250+ points to receive a UTD Apron to help you continue the healthy habits all year round.

• **Heart Walk and National Wear Red Day**
  – Friday, February 7 @ 10 am
  – Main Campus – Margaret McDermott Trellis Plaza
  – Callier Center Dallas – Main Lobby
  – Center for BrainHealth – Main Lobby of BPI
  – Center for Vital Longevity – See Vivian Brockwell

• **Heart Health Oatmeal Bar & Blood Pressure Checks**
  – Tuesday, February 18 from 9:30am – 11am, SSA Gaming Wall

• **Campus-wide Health Fair**
  – Tuesday, March 9 from 11am – 2pm, Visitor Center Atrium
THANK YOU to everyone who participated in the Keep UT Active Fall Wellness Challenge!

UT Dallas received the award for:

- Greatest Increase in Registration
- Greatest Percentage of Repeaters
- Greatest Percentage of New Registrants

A Healthy YOU is a Healthy UTD 😊
Make Appointments

• Due to the volume of walk-ins for benefits and leave counseling, we encourage employees to make appointments unless there is an emergency situation.

• Avoids or reduces wait time at the front desk.
• Helps us serve you better.
• Makes us more efficient.
• Walk-in Schedule is being considered to help us meet our processing deadlines.
Colleen Dutton, Chief Human Resources Officer

Q & A ???
HR Contact Emails

- hr@utdallas.edu – issues relating to general HR concerns.
- employverify@utdallas.edu – to request employment verification.
- compensation@utdallas.edu – issues relating to compensation including PRR, reclassifications, job descriptions, FLSA, and reorganizations.
- employmentservices@utdallas.edu – questions relating to general employment, onboarding and Employment Express.
- jobs@utdallas.edu – issues relating to jobs including access to PA7 and job postings.
- visashr@utdallas.edu – issues relating to international hiring, hiring of foreign nationals, or immigration including (but not limited to) J-1 (for scholars) and H1-B requests, travel signatures, and I-765 completion.
- benefits@utdallas.edu – issues relating to benefits and retirement.
- hcm-timereporting@utdallas.edu – issues relating to time reporting.
- loa@utdallas.edu – questions relating to Family & Medical Leave (FMLA), leaves of absence, and other leave programs.
- employeerelations@utdallas.edu – employee relations related questions.
- serviceawards@utdallas.edu – questions related to service awards.
- appraisals@utdallas.edu – questions relating to appraisals and to submit appraisals.
- hrtraining@utdallas.edu – questions relating to training or to request specific training.
THANK YOU FOR COMING!

Next Human Resources Forum
March 4, 2020
10:00 AM – 11:30 AM
TI Auditorium (ECSS 2.102)