

FAS Administrators' Town Hall

November 17, 2021
Zoom



Agenda

Welcome

Scott Jordan

FAS Study Group

Claudine Gay

Introductions & Finance Update

Scott Jordan, Jay Herlihy

HUIT

Dave LaPorte, Susan DeLellis

OPRP

Zak Gingo

HR

Kathy Santoro, Meryl Miller, Paul Curran, Allen Aloise

Administrative Operations

Mary Ann Bradley, Bill Desimone, Todd Sears

Closing / Q & A Session

Scott Jordan



Welcome

Scott Jordan

Dean of Administration and Finance



FAS Study Group

Claudine Gay

*Edgerley Family Dean
of the Harvard Faculty
of Arts and Sciences*



Financial Updates

Scott Jordan

*Dean of
Administration and
Finance*

Jay Herlihy

*Associate Dean for
Finance*

FAS Financial Report

Administrative Town
Hall

November 17, 2021

Scott Jordan

FAS Dean for
Administration
& Finance

Jay Herlihy

Associate Dean for
Finance



Agenda

FY21 Year-End Review

Discussion of Faculty Finance Study

Planning for FY24 Budget

Agenda

FY21 Year-End Review

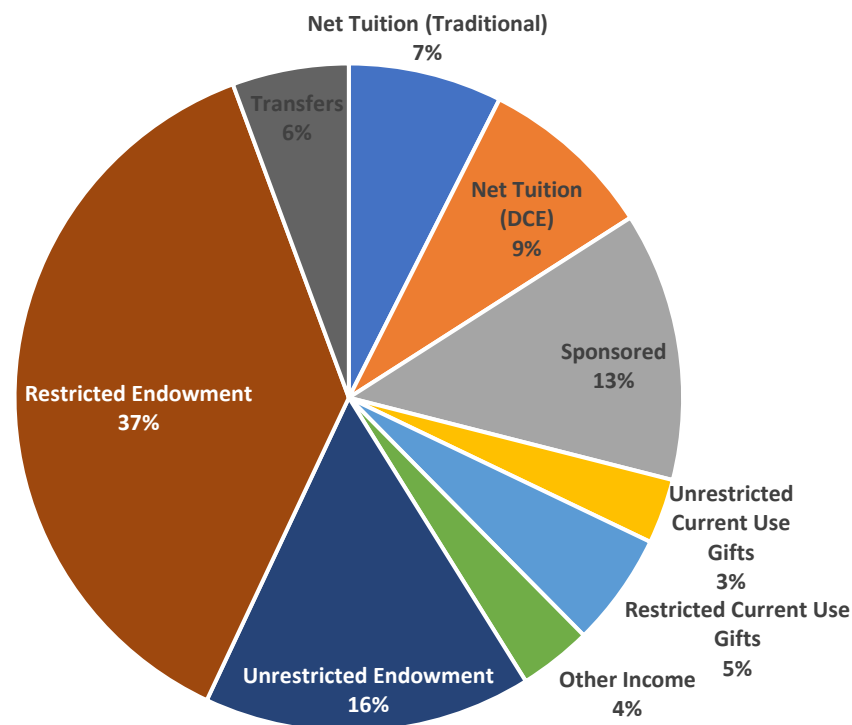
Discussion of Faculty Finance Study

Planning for FY23 Budget

Revenue

- Philanthropy
 - 53% Endowment
 - 2/3rds restricted
 - Current use giving
- Enrollment/Tuition
- DCE offerings, enrollments

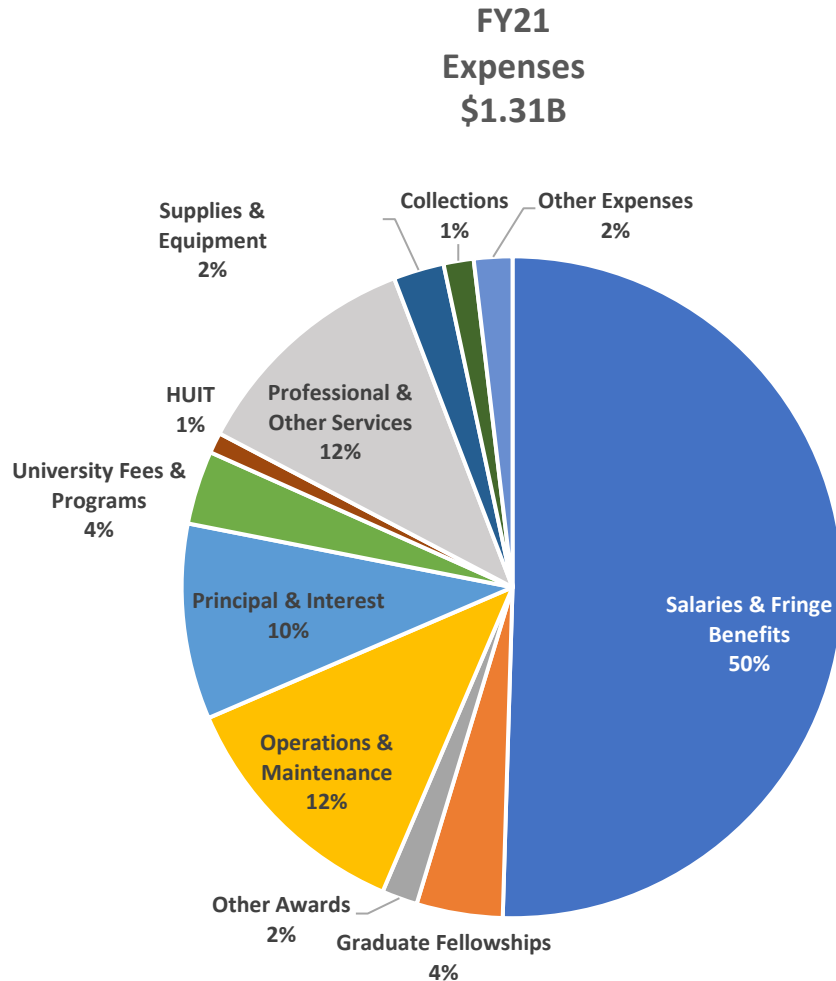
FY21
Net Revenues
\$1.43B



Amounts drawn from FAS Managerial Report Consolidated Statement of Activity

Expenses (By Function)

- People:
 - 50% Salaries and Fringe
- Buildings:
 - 12% Operations & Maint
 - 10% Debt Service

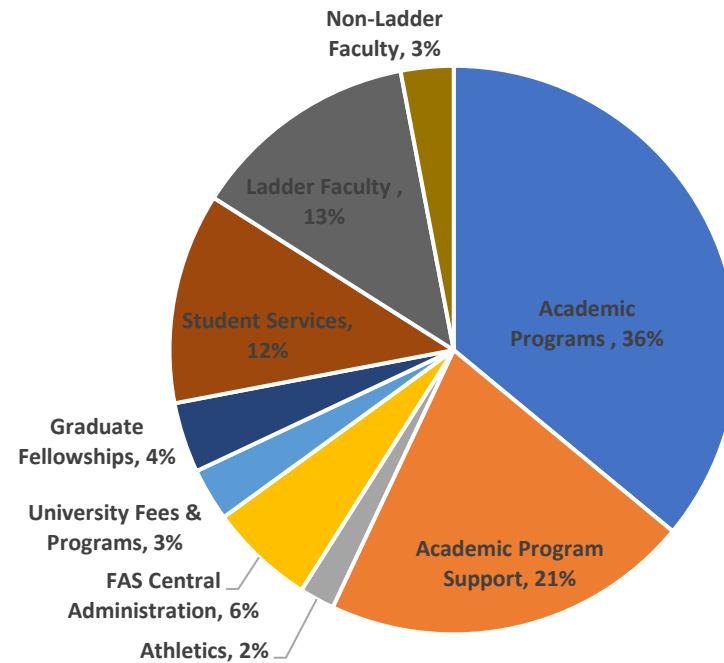


Amounts drawn from FAS Managerial Report Consolidated Statement of Activity

Expenses (By Program)

- Academic Programs (36%)
 - Academic divisions , SEAS (subvention), DCE
 - Harvard College Library, FAS Museums
 - Dumbarton Oaks, Rowland, S.Fellows
- Academic Program Support (21%)
 - TAs/TFs
 - Bok Center
 - Research Administration Services
 - Research Computing
 - HUIT fees, Academic Facilities
- Student Services (College, GSAS) (12%)
- FAS Central administration (6%)

**FY21
Expenses
\$1.31B**



Amounts drawn from FAS Internal Programmatic Report

FY21 Expected COVID Impacts

- Dedensification of campus
- Loss of student revenues
- New student support costs, investments in teaching and learning, facilities adaptations
- Disruption to research, uncertain impact on sponsored programs
- Disruption/cancellation of Study Abroad, Summer School, Professional Development Programs
- Uncertain impact on economy, markets, endowment and philanthropy

Managing through FY21

- Established guiding principles
 - Put health and safety first*
 - Protect the academic enterprise*
 - Leverage our breadth and diversity*
 - Preserve access and affordability*
- Specific financial measures:
 - Control compensation costs
 - Limit faculty searches
 - Structural controls for hiring staff
 - Scrutiny of capital projects
 - Eliminating “non-essential spending”

FY21 vs. FY20 Change in Revenue



Amounts drawn from FAS Managerial Report Consolidated Statement of Activity

FY21 vs. FY20

Change in Operating Expense



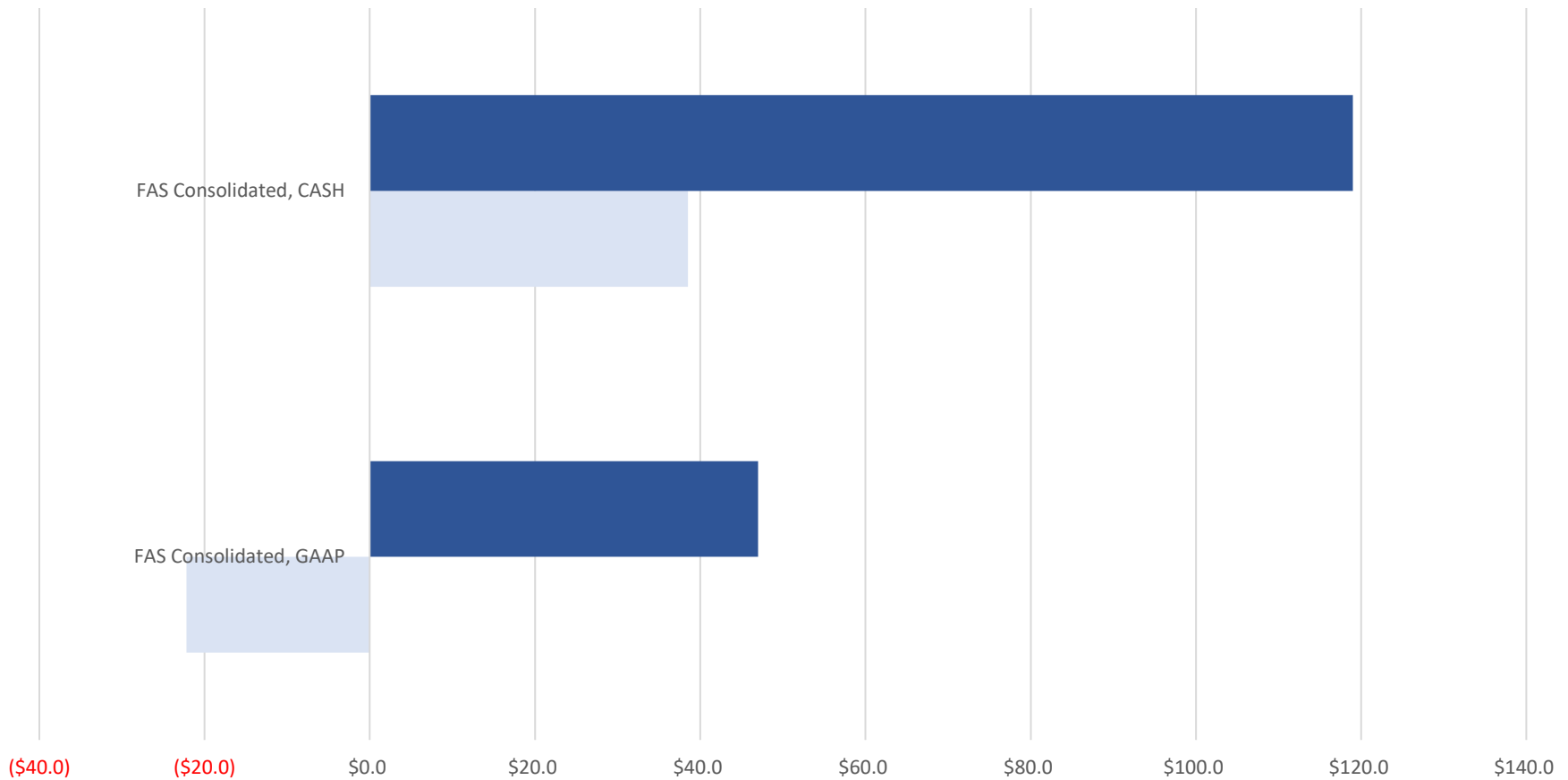
Amounts drawn from FAS Managerial Report Consolidated Statement of Activity

FY21 Results vs. FY20 Results

Improvements in Every View of our Financial Statements

Consolidated Results

■ FY 21 Actual Results ■ FY20 Actual Results



FY21 Results in Context

- Significant improvement
- Adjustments made as improvements came into view
- BUT shared sacrifice = activities not undertaken to advance the mission
- Looking forward:
 - FY21 33.6% endowment return
 - FAS unrestricted reserves
 - Better understanding of the FAS economic model

Next Steps

- Follow our principles
- Make targeted investments
- Unlock the resources we have to better support the ambitions of the faculty

Agenda

FY21 Year-End Review

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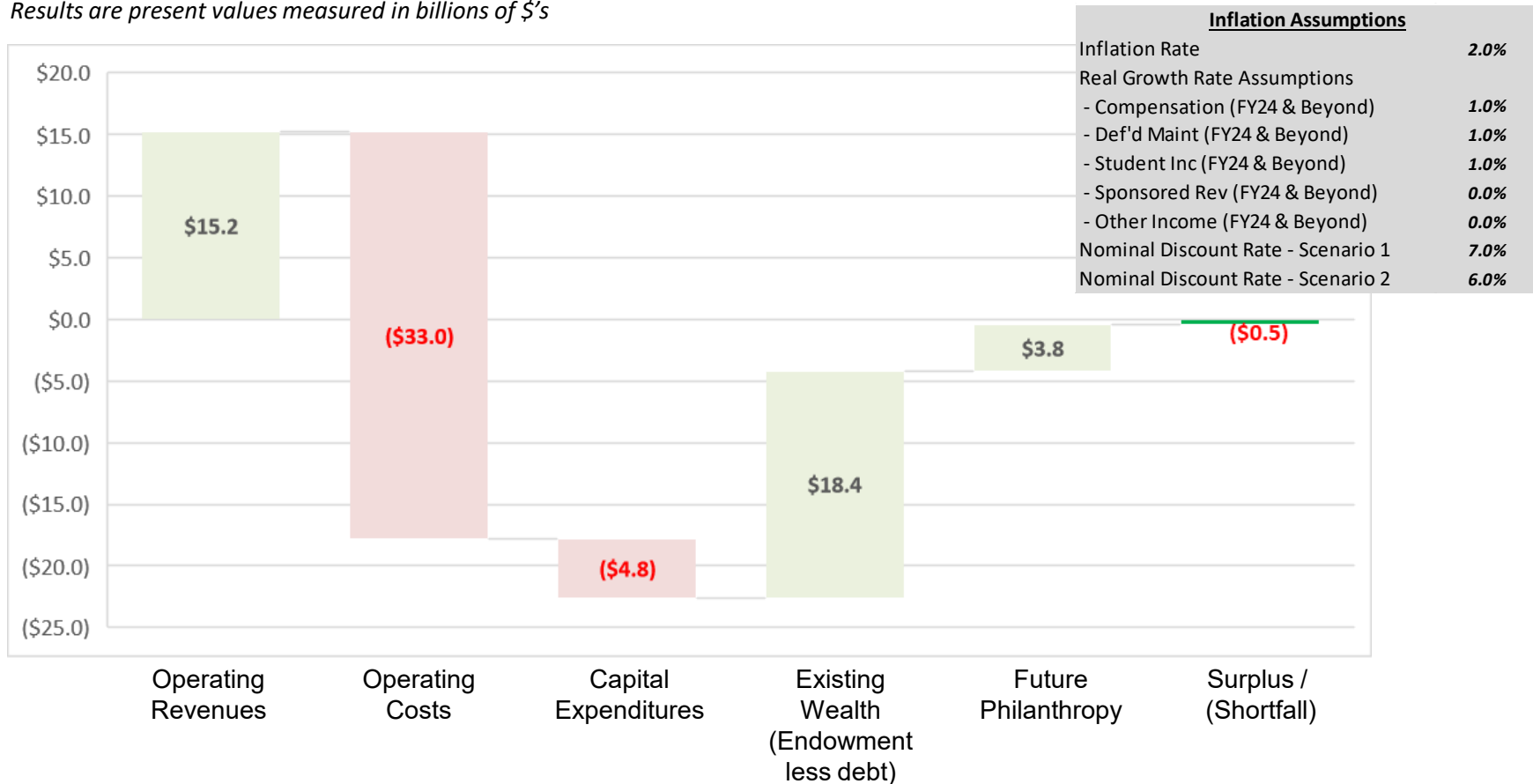
Overview

- These materials reflect the summary analysis of the Economic Budgeting Subcommittee of the FAS Faculty Finance Review, including:
 - A Framework for Analyzing the Budget of the FAS
 - Scenario Analysis within that Framework
 - History on How FAS Got to this Point

Subcommittee: John Campbell (chair), Stephen Blyth, Jay Herlihy, Thomas Hollister, and Jeremy Stein

Summary of Base Case: Present Value Shortfall of \$0.5 billion

Results are present values measured in billions of \$'s



Interpretation of our findings

- In our base case, the FAS has a present value shortfall of \$0.5 billion.
- This corresponds to a real structural deficit of \$24 million (5% x \$0.5 billion) per year.
- Full details are presented in a spreadsheet on the following page.

Scenario Analysis: Understanding the framework's sensitivity to endowment returns and operating cash flow growth rates



Sensitivity to Endowment Return Assumptions

- The FAS is extremely vulnerable to a lower average return on the endowment. If we use a 6% discount rate, corresponding to a 4% average real return on the endowment, the present value shortfall is \$5.8 billion corresponding to a real structural deficit of \$232 million (4% x \$5.8 billion) per year.
 - In the current market environment of low interest rates and high stock prices, the assumption of a 5% real return is ambitious and 4% may be more realistic.
- These results highlight the exposure of the FAS to financial market risks.

Sensitivity to Growth Rate of Operating Cash Flows Assumptions

- In the base case we assume that real compensation growth of 1% per year resumes in FY27 and subsequently, and also that real student income grows at 1% per year (but other revenue sources do not grow in real terms).
- If we assume 0.5% faster growth in real compensation from FY27, the shortfall increases by about \$2.7 billion and the structural deficit increases by about \$134 million; if we assume 0.5% slower growth, the shortfall and structural deficit are eliminated.
- The long-term budget framework correctly focuses attention on ways to grow revenues over time relative to costs.

Agenda

FY21 Year-End Review

Discussion of Faculty Finance Study

Planning for FY24 Budget



Our Charge from Dean Gay

Build a budget that reflects:

- Stewardship
- Intentionality
- Mission-Alignment
- Sustainability





Our Charge from Dean Gay Con't

Run a budget process that is:

- Strategic
- Derivative of a separate strategic planning process
- Transparent and comprehensive
- Supportive of decentralized leadership
- Facilitates accountability





Formative Questions

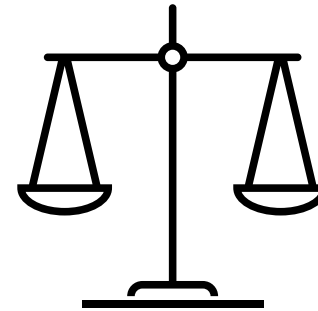
- What does our budget and budget process communicate about FAS - internally and externally?
- What role does the budget play in overall financial management and overall *management*?
 - Strategic Plan
 - Multi-year finance plan/Economic Budgeting Model
 - *Annual Budget*
 - Capital Budget
 - Regular Reporting
 - Program Review





Formative Questions Con't

- What behaviors does our budgeting system incentivize?
 - Risk taking vs. aversion
 - Spending vs. hoarding
 - Tactical vs. strategic
 - Local vs. institutional
- What would an improved process at FAS look like?





The Work Ahead

- Convene a Steering Committee
- Listen to you all
 - In your divisional meetings
 - In Small Group Conversations that we are organizing
- Develop some recommended changes we can pilot next fall





HUIT Updates

Dave LaPorte

*Senior Director,
Network Strategy and
Services*

Susan DeLellis

*Director, Project
Management and
Service Delivery*



Campus Wi-Fi Issue

- Several systemic wireless issues significantly impacted Fall Semester startup
- Harvard, along with 50+ higher-ed institutions, were impacted by multiple (6) defects present in the software provided by wireless software vendor
- Software patches provided by vendor have been applied and the wireless network has been stable since September 24th



Ongoing Wi-Fi Improvement

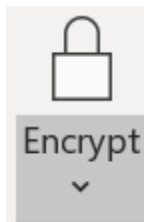
- While core wireless network functionality has achieved stability, new use cases such as Zoom have highlighted performance concerns and coverage gaps
 - Installation of additional wireless sensors and partnership with FAS to improve monitoring
 - Investigate Zoom call experience data as a mechanism to proactively identify wireless coverage gaps and user experience issues
 - Wireless surveys of FAS buildings to determine coverage gaps



Using Microsoft Office Message Encryption (OME)



- Conveniently encrypt confidential emails (high risk, level 4) and attachments directly in your Outlook web or desktop apps for file sizes up to 150 MB.
- You can send encrypted email to internal and external recipients and they don't need a Microsoft 365 account to open it.
- Shared or departmental email accounts can be configured to use OME – contact the [HUIT Service desk](#).
- Kiteworks to be replaced to support large file transfers/special use cases.
- We are working with InfoSec and Communications to simplify the classifications of our data, and help guide users in the appropriate use of our tools. More to come in 2022 on the HUIT flagship service website!



[Send an encrypted email in Outlook.](#)



Tents, Testing and Door Schedules

Zak Gingo

*Associate Dean for Physical
Resources and Planning*



Tents

- 48 on FAS Campus today
- 24 staying up through the winter
- Distributed across campus
- No heat
- Cannot enclose
- Subject to regular CFD/ISD review



Testing

November

- Last test pick up: 12 noon on Wednesday, 11/24
- No collection or testing 11/25 or 11/26
- Otherwise, standard schedule

December/January

- Standard schedule through Sunday, 12/19
- 12/20 – 1/2
 - No need to test if not on campus
 - No compliance monitoring (may still receive automated reminders)
 - May come to campus to test if you wish (for travel, suspected exposure)
- No collection or testing 12/24, 12/25, 12/31 or 1/1
- 1/3: Return to standard schedule



Door Schedules

November 17 to 24; November 29 to December 17

- Regular schedule
- Doors unlocked on weekdays
- Doors locked on weekends

November 25 – 28 (Thanksgiving Break)

- Holiday schedule
- All doors locked

December 20 to January 2 (Winter Break)

- Holiday schedule
- All doors locked



Vaccination Compliance Update

HUCTW Contract Ratification Update

Kathy Santoro

*Interim Associate Dean
for Human Resources*

Paul Curran

*Director, Director of
Labor and
Employee Relations*

Meryl Miller

*Associate Director, HR
Systems*



COVID-19 Vaccination Compliance Reporting

University policy and the Biden Administration executive order mandates that faculty and staff either be vaccinated or apply for a medical or religious exemption.

- ☐ On October 15, 2021, President Bacow, Alan Garber, Katie Lapp, and Giang T. Nguyen sent an email to the University community with the message that faculty and staff needed to have proof of vaccination on file with HUHS or have an approved exemption by **December 8, 2021** or they would no longer be eligible to work at Harvard.
- ☐ The White House has extended the December 8 deadline to **January 18**.
- ☐ Staff who were not in compliance with University policy and the executive order were also sent personalized emails from HUHS on October 15.
- ☐ FAS HR Consultants worked directly with managers to inform and assist staff who were not in compliance as of November 1, 2021.
- ☐ Staff can check to see if their vaccination status has been updated with HUHS in the [Patient Portal](#) or in [Crimson Clear](#).
- ☐ Staff who have already submitted their exemption form but have not received confirmation of approval within two weeks should contact mrecords@huhs.harvard.edu or call 617-495-2055.



Vaccination Compliance Data

	<i>October 26 Manager and HRC Outreach</i>	<i>November 3</i>	<i>November 12</i>
All Noncompliant Staff Listed	189	163	109
Regular Staff	73 (39%)	52 (32%)	37 (34%)
Temporary Staff	116 (61%)	111 (68%)	72 (66%)
New To The List	N/A	37*	20*
Resolved from last list	N/A	63	74
In Process of Being Resolved	189	26	10
Remain Noncompliant	189	74	84

**Individuals new to the lists may be due to being recently hired, having a change in testing group, or needing to formally file for an exemption.*



Vaccination Compliance Update

There are many reasons why employees might appear as noncompliant:

- They have not reported their vaccination status to HUHS
- They reported in Crimson Clear they are not vaccinated
- They reported in Crimson Clear they are in the process of being vaccinated, but have submitted nothing to HUHS
- They are in the process of claiming an exemption.
- They have submitted a record of one dose *of a two-dose series* to HUHS and are **overdue** for or have not submitted a record of their 2nd dose
- They have submitted a record of one dose *of a two-dose series* and are not yet due for their 2nd dose
- They have been vaccinated with a non-FDA/World Health Organization (WHO) approved vaccine

☐ Staff should work with HUHS to ensure their records are up to date. If a staff member believes they are complying yet continues to show up on reports as noncompliant **they can email mrecords@huhs.harvard.edu or call (617) 495-2055.**



HUCTW Contract Update

- The University and HUCTW reached a one-year contract that will run from October 1, 2021 to September 30, 2022.
- HUCTW members with at least one year of service as of 10/1/2021 will receive a **salary increase to their base pay of 2.9%**. Members with less than one year of service will have their raises prorated.
- Members will receive an implementation bonus and those with at least six months of service as of October 1, 2021 will also receive a lump sum bonus of \$500.
- Letters informing staff of the raises and bonus(es) will be available for departments to send to eligible employees on Monday, November 22.



HARVARD UNIVERSITY
Information Technology

FAS ATH PeopleSoft Out of State Employees

November 17, 2021

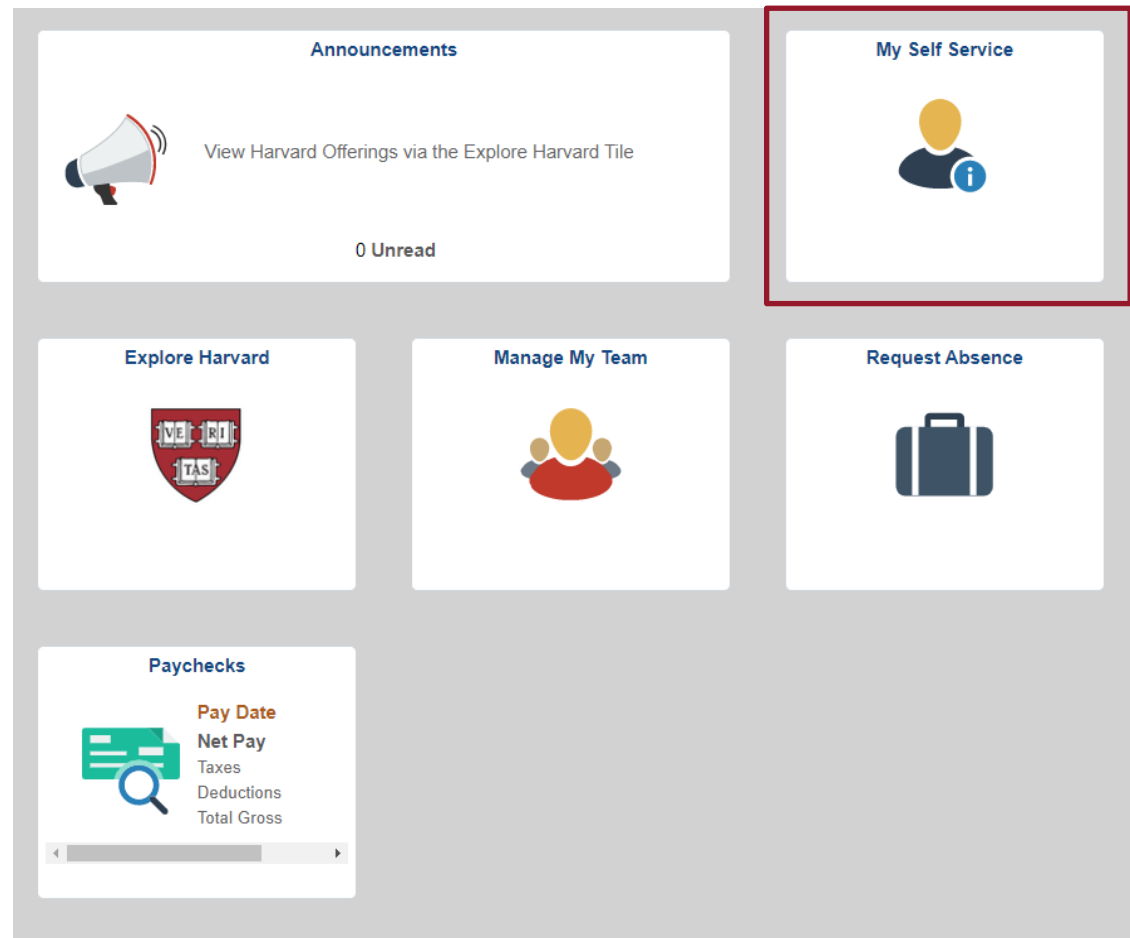
Out of State Employees

For Employees working more than 20% of their time outside of MA:

- New PeopleSoft Employee Self Service pages available for employees to:
 - Add Harvard Registered states are employee is working from
 - Indicate the percentage of time the employee is working from these states (Exempt Employees)
 - Submit state withholding forms
 - Enter Time (time reporters) indicating the state working from

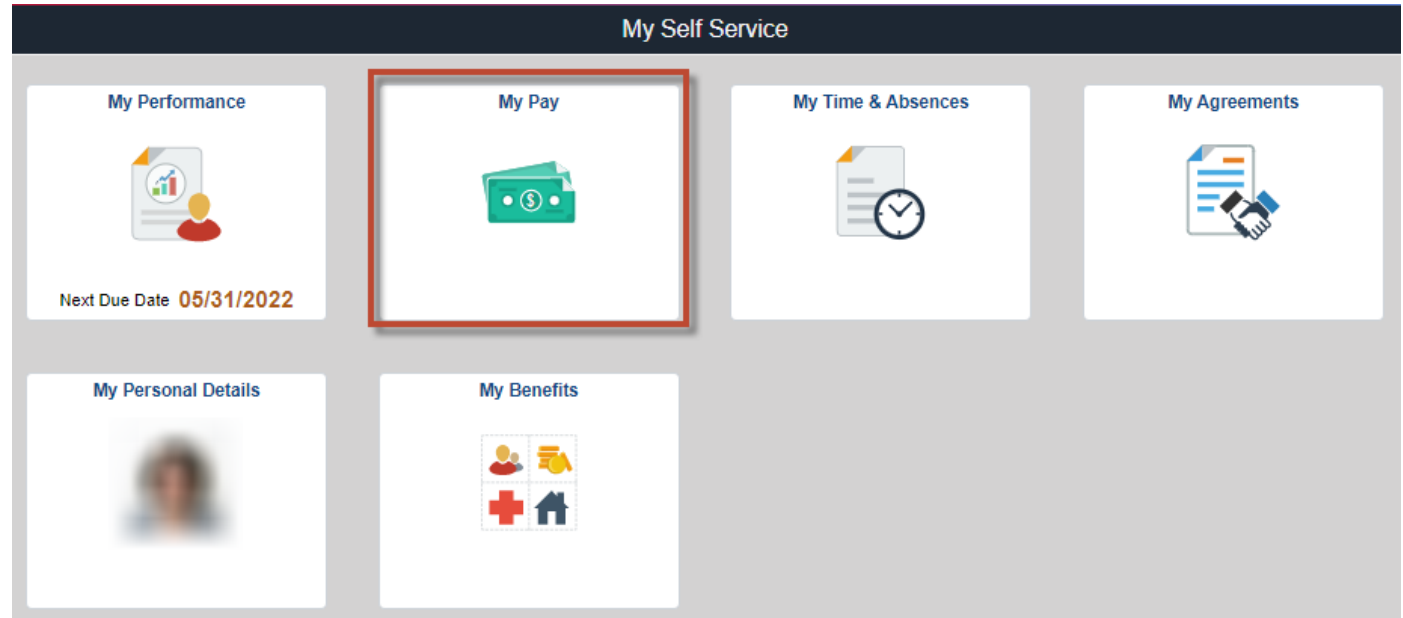
Navigating to Tax Withholding Pages

- Log into PeopleSoft
- Select *My Self Service*



Navigating to Tax Withholding Pages (continued)

Select *My Pay*



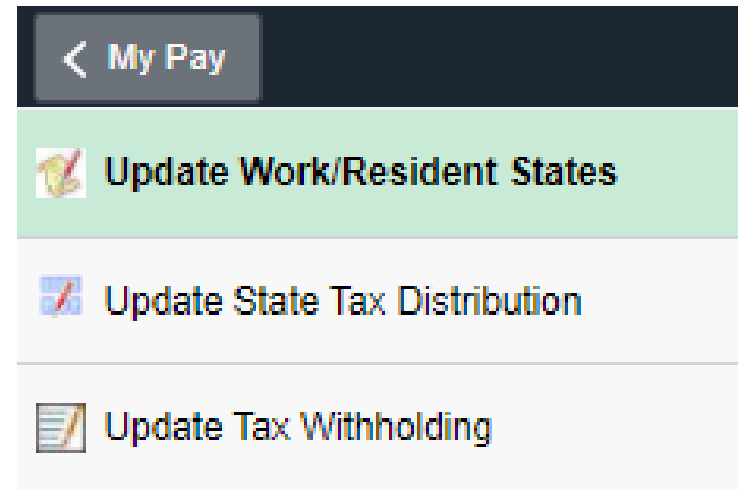
Select *Tax Withholding*



Tax Withholding Pages

Three steps must be completed to have appropriate tax withholdings made if working outside of Massachusetts.

1. Update your work and resident state(s)
2. Update your state tax distribution
3. Update or submit appropriate state tax form(s)



Update Work/Resident States

[My Pay](#)

Tax Withholding

[Sign Out](#)

Update Work/Resident States

Update State Tax Distribution

Update Tax Withholding

Save

To ensure correct tax withholdings when working from a Harvard registered state, please complete these four steps over the next few pages:

On the page below:

1. Confirm or update your state of primary U.S. residence (by selecting "Yes" next to the appropriate state below). Only one state may be selected.
2. Use the + to add any additional states Harvard is registered in where you are physically working.
3. Some areas have local withholding taxes. If your area has a local tax, a drop down will appear below. Please select the locality as needed.

Next, using the pages on the left menu:

4. Update your state tax distribution, meaning the percentage of time you are physically working from each state.
5. Submit the appropriate state tax withholding form(s). If you allocate time to a state but do not submit a tax form for that state, your withholding will be at the default rate for that state.

Employees should also update any changes to their home address (My Personal Details>Addresses). The home address drives health plan benefit options. See [What happens to my benefits if my address changes?](#)

For additional questions, please refer to [Central Payroll | Office of the Controller \(harvard.edu\)](#)

Company Harvard University

Tax States

+

State

Massachusetts

New Hampshire

Resident

No

Yes

Current Employees

Will most likely show Massachusetts as default residence state (based on tax information on file).

Confirm or select appropriate state in which you are a resident

Add additional states if approved to be working in other Harvard registered states

New Employees – Hired after 9/26/21

Will have Massachusetts and their Harvard registered payroll state listed based on home address in PeopleSoft. Resident state will be based on home address in PeopleSoft

Confirm or select appropriate state in which you are a resident

Add additional states if approved to be working in other Harvard registered states

Update State Tax Distribution

[< My Pay](#)

Tax Withholding

[Sign Out](#) [Home](#) [Search](#) [Menu](#)

[Update Work/Resident States](#)

[Update State Tax Distribution](#)

[Update Tax Withholding](#)

[Save](#)

For each job, indicate the percentage of time you are working from each state.

Please note the following:

- The percentage must add up to exactly 100% for **each job** listed.
- For hourly or over-time eligible jobs, indicate 100% for the state and locality that you most typically work in. This will become the default location when entering time. If you work from another registered state, you must select that state when entering time in order to have tax withholding adjusted.
- To delete a state that is no longer worked from or residing in, distribution must be set to 0% on all jobs listed

For additional questions, please refer to [Central Payroll | Office of the Controller \(harvard.edu\)](#).

Company Harvard University

Job Information (30500, 4)

Department CADM^HUIT^Admin Tech Serv^HR

Business Title Associate Director, HR Systems

Tax Distribution (30500, 6)

State	Massachusetts	Percent of Distribution	40.000
State	New Hampshire	Percent of Distribution	60.000
		Distribution Percent Total	100.000

Based on the states listed in the Update Work/Resident States section, enter the percentage time/distribution the employee expects to work in each state.

- The percentage must add up to 100% for **each job** listed.
- For **exempt employees**, this percentage will be used in their tax withholding calculations.
- If no longer working or residing in a state, enter the distribution to 0%.
- See training materials on the [Central Payroll website](#) if you need help in determining percentage of distribution.

Update State Tax Distribution - Example of Multiple Jobs

< My Pay

Tax Withholding

Sign Out

🏠

🔍

⋮

📌 Update Work/Resident States

📌 Update State Tax Distribution

📌 Update Tax Withholding

Save

For each job, indicate the percentage of time you are working from each state.

Please note the following:

- The percentage must add up to exactly 100% for **each job** listed.
- For hourly or over-time eligible jobs, indicate 100% for the state and locality that you most typically work in. This will become the default location when entering time. If you work from another registered state, you must select that state when entering time in order to have tax withholding adjusted.
- To delete a state that is no longer worked from or residing in, distribution must be set to 0% on all jobs listed

For additional questions, please refer to [Central Payroll | Office of the Controller \(harvard.edu\)](#).

Company Harvard University

Business Title Director of Digital Infrastructure and Emerging Technologies

Tax Distribution

State Massachusetts

Percent of Distribution60.000

State Vermont

Percent of Distribution40.000

Distribution Percent Total100.000

Job Information

Department FAS^FDCE^Other Academic

Business Title DCE Teaching Support

Tax Distribution

State Massachusetts

Percent of Distribution100.00

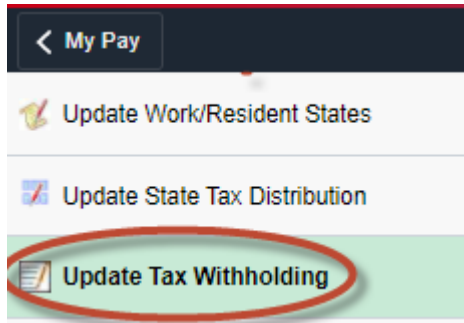
State Vermont

Percent of Distribution00.00

Distribution Percent Total100.000

49

Update Tax Withholding



Based on the states listed in the Update Work/Resident States section, select and complete the tax form(s) for each state.

- If a state percentage of distribution has been entered but the tax form has not been completed, employee will be taxed at the default tax rate.
- Each state tax form will have links to instructions on how to complete the form for that particular state.
- Some states may also have local tax forms or local taxes withheld.

A screenshot of the 'Update Tax Withholding' form. The left sidebar shows three menu items: 'Update Work/Resident States', 'Update State Tax Distribution', and 'Update Tax Withholding' (highlighted). The main content area is titled 'Update Tax Withholding' and shows 'Company: Harvard University' and 'Status: Active'. Below this is a table with three rows of tax withholding details for Federal, Massachusetts, and New Hampshire. Each row has expandable sections for 'Withholding Details', 'Withholding Allowances', 'Additional Allowances', and 'Other'.

Form Type	Jurisdiction	Withholding Details			
Federal	Federal	Tax Status	Married	Withholding Allowances	0
		Additional Amount	500.00	Additional Allowances	>
		Additional Percentage		Other	
State	Massachusetts	Tax Status	Married	Withholding Allowances	0
		Additional Amount	0.00	Additional Allowances	>
		Additional Percentage		Other	
State	New Hampshire	Tax Status	N/A	Withholding Allowances	0
		Additional Amount	0.00	Additional Allowances	>
		Additional Percentage		Other	

Update Tax Withholding (continued)

< My Pay

Update Work/Resident States

Update State Tax Distribution

Update Tax Withholding

Tax Withholding

Sign Out

Home

Search

More

Update Tax Withholding

Company Harvard University

Status Active

Form Type	Jurisdiction	Withholding Details		
Federal	Federal	Tax Status	Married	Withholding Allowances 0
		Additional Amount	500.00	Additional Allowances >
		Additional Percentage		Other
State	New York	Tax Status	Married	Withholding Allowances 0
		Additional Amount	0.00	Additional Allowances >
		Additional Percentage		Other
State	Connecticut	Tax Status	CT Code F	Withholding Allowances 0
		Additional Amount	0.00	Additional Allowances >
		Additional Percentage		Other
State	Massachusetts	Tax Status	Married	Withholding Allowances 0
		Additional Amount	0.00	Additional Allowances >
		Additional Percentage		Other
State	Maine	Tax Status	Single	Withholding Allowances 0
		Additional Amount	0.00	Additional Allowances >
		Additional Percentage		Other

Update Tax Withholding Pop-Up Examples

State Tax Withholding Forms

Company Harvard University

The State of New Hampshire does not require state income tax to be withheld from your paycheck. Therefore New Hampshire does not have a withholding form and no updates are needed.

Update Tax Withholding Pop-Up Example (continued)

State Tax Withholding Forms

Company Harvard University

You may complete New York Form IT-2104 so the Payroll Department can calculate the correct amount of tax to withhold from your pay. New York income tax is withheld from your wages based on what you claim on the Employee's Withholding Allowance Certificate (form IT-2104). You can file a new NY IT-2104 form anytime your tax situation changes.

Whether you are entitled to claim a certain number of allowances is subject to review by the State. Your employer may be required to send a copy of this form to the Agency.

You can make changes to your withholding allowances online using the updateable form below. Be sure to print or save a copy of the completed form for your records. These changes will not impact any payroll currently in progress.

Updateable Forms

Form Description
New York Withholding Allowance Certificate >



State Tax Withholding Form Example

New York Withholding Allowance

Complete New York Employee's Withholding Allowance so that your employer can withhold the correct New York income tax from your pay. Your withholding is subject to review by the State of New York. Please refer to the form instructions for full details <https://www.tax.ny.gov/>

For further questions, please refer to our website at: <https://oc.finance.harvard.edu/>

Name

Meryl T. Miller

Address

340 East 34th Street

New York, NY 10016

Withholding Allowance

*Tax Filing Status

Resident of New York City ☐ No

Resident of Yonkers ☐ No

Total number of allowances for New York State and Yonkers

Total number of allowances for New York City

Additional withholding for New York State per pay period

Additional withholding for New York City per pay period

Additional withholding for Yonkers per pay period

Exempt

Exemption from withholding. By claiming exemption from withholding, you certify that you owed no Federal income tax in 2020, and that you expect to owe no Federal income tax in 2021. If you claim exemption from withholding, no income tax will be withheld from your paycheck.

Acknowledgement

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

Links to state tax form instructions can be found on this page.


Employees should consult with a tax advisor with any questions around tax withholding and reporting requirements.

Entering Time - Additional Work Locations


◀ 22 August - 28 August 2021 ▶
Weekly
Scheduled 35.00 | Reported 0 Hours


[View Legend](#) [Request Absence](#) [Submit](#)

Time Reporting Code / Time Details	22-Sunday	23-Monday	24-Tuesday	25-Wednesday	26-Thursday	27-Friday	28-Saturday
	Scheduled OFF Reported 0	Scheduled 7 Reported 7	Scheduled 7 Reported 7	Scheduled 7 Reported 7	Scheduled 7 Reported 7	Scheduled 7 Reported 7	Scheduled OFF Reported 0
REG - Regular				7.00	7.00	7.00	
REG - Regular		7.00	7.00				
Comments							

1. Select **REG - Regular** from the **Time Reporting Code**
2. Select the drop-down  and enter USA for Country and the registered payroll state.

[Cancel](#) **Time Details** [Done](#)

Country  United States State  Massachusetts

Locality 

3. Some states (CA and NY) may have local taxes which are required. In those cases, select Locality and select the appropriate local taxes to be withheld.
4. Enter hours worked to the nearest quarter hour (.00 .25 .50 .75) for each day.

Hourly Employee – Withholding Example 1

Charles Chauncy works the majority of his time in Massachusetts but lives in New Hampshire.

Charles entered 100% for Massachusetts on the *Update State Tax Distribution Screen* in PeopleSoft.

For the week ending 11/28 Charles worked a total of 4 days in Massachusetts and 1 day in New Hampshire.

Example 1

- Charles applies his schedule for the week without breaking out his time worked by state.
- Charles will have Massachusetts taxes withheld for the full pay period based on his PeopleSoft default distribution.
- Harvard will not make tax adjustments retroactively.

< My Pay Tax Withholding Sign Out

Update Work/Resident States

Update State Tax Distribution

Update Tax Withholding

Save

For each job, indicate the percentage of time you are working from each state.

Please note the following:

- The percentage must add up to exactly 100% for each job listed.
- For hourly or over-time eligible jobs, indicate 100% for the state and locality that you most typically work in. This will become the default location when entering time. If you work from another registered state, you must select that state when entering time in order to have tax withholding adjusted.
- To delete a state that is no longer worked from or residing in, distribution must be set to 0% on all jobs listed

For additional questions, please refer to [Central Payroll | Office of the Controller \(harvard.edu\)](#).

Company Harvard University

Job Information (30500, 4)

Department CADM*HUIT*Admin Tech Serv*HR

Business Title Associate Director, HR Systems

Tax Distribution (30500, 6)

State	Massachusetts	Percent of Distribution	100.000
State	New Hampshire	Percent of Distribution	0.000
Distribution Percent Total			100.000

Hourly Employee – Withholding Example 2

Charles Chauncy works the majority of his time in Massachusetts but lives in New Hampshire.

Charles entered 100% for Massachusetts on the *Update State Tax Distribution Screen* in PeopleSoft.

For the week ending 11/28 Charles worked a total of 4 days in Massachusetts and 1 day in New Hampshire.

Example 2

- Charles applies his schedule the week ending 11/6/2021 and deletes 7 hours from that row.
- Charles adds a row, enters 7 hours and selects New Hampshire as the state work location.
- Charles will have taxes prorated and withheld based on the default state and state entered. So, 80% based on Massachusetts tax rate and 20% for New Hampshire (or no taxes withheld).

Time Reporting Code / Time Details

	22-Sunday	23-Monday	24-Tuesday	25-Wednesday	26-Thursday	27-Friday	28-Saturday
Scheduled OFF Reported 0	Scheduled 7 Reported 7	Scheduled 7 Reported 7	Scheduled 7 Reported 7	Scheduled 7 Reported 7	Scheduled 7 Reported 7	Scheduled OFF Reported 0	
REG - Regular		7.00	7.00	7.00	7.00	7.00	

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Scheduled OFF Reported 0	Scheduled 7 Reported 7	Scheduled 7 Reported 7	Scheduled 7 Reported 7	Scheduled 7 Reported 7	Scheduled 7 Reported 7	Scheduled OFF Reported 0	
REG - Regular		7.00		7.00	7.00	7.00	
REG - Regular			7.00				

Time Details

Country United States State New Hampshire

Locality



Multiple State Tax Reporting Guidance

- **How do we calculate the percentage of distribution between states for exempt employees:**
 - Since exempt employees are not paid overtime, the percentage of distribution would be based on their standard assigned hours
- **How is the tax reporting distribution calculation allocated?**
 - The % calculation can be based by pay period, monthly, or annually depending upon how often the employee's schedule changes and how often they need to update their % distribution when working in multiple states.
 - Informal and incidental work does not require a change to withholding only employees working more than 20% of their time in another Harvard payroll state.
 - Tax withholding is always an estimate so the hope is that everything will even out at the end of the calendar year.
- **How frequently can someone change their tax reporting in PeopleSoft for different states?**
 - You can adjust your percentage of distribution as often as you wish. Any changes would be applied to the next available pay check and would be applied going forward until they are changed again.
 - We suggest changes be made at least 5 business days before a paycheck date for changes to be applied to that paycheck
- **Where can I go for more specific guidance?**
 - For questions on how to update and enter information in PeopleSoft contact ufs_crt@harvard.edu
 - For questions around creating flex schedules, speak with your Manager and/or HR Consultant
 - For questions around specific state tax filing requirements, consult a tax professional
- **Additional Resources in the Training Portal:**
 - [Entering and Editing Residence, State Distribution\(s\), and Tax Form\(s\)](#)
 - [Report Time and Absences](#)
 - [Rapid Time](#)
 - [Approving, Adjusting, Time and Absence](#)



Administrative Operations Updates

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Technology to Enable Hybrid Work in the FAS

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Hybrid work requires equal productivity from anywhere



Program Highlights

- FAS Leadership and HUIT are committed to ensuring that all staff have the capability to work effectively in a hybrid environment
- FAS will make investments in technology to ensure that we can support the community with the appropriate tools to be productive both at home and on campus
- Desktop users will be afforded the opportunity to switch to a laptop bundle ahead of the normal refresh cycle. Current laptop users can request additional peripheral tools to create adequate workspaces both at home and at work



Items being sourced for this effort include

- **Laptop Computers** – These devices will be offered to anyone who has a HUIT issued desktop computer as a sole primary device.
- **Peripheral Devices** – Laptop computers that are issued as part of this program will include a peripheral bundle. For those that already have a laptop, these peripheral devices will be offered as an a la carte option to support home and office workspaces.
 - External Monitor
 - Docking Station (Windows Only)
 - Wireless Keyboard and/or Mouse
 - USB-C Gigabit ethernet adapter (Apple Only)
 - Camera (Optional)
 - Speakers (Optional)
- **Scope** – Approximately 624 desktop users will be offered a laptop bundle as a replacement option. Staff who already have laptops through the HUIT refresh program will be eligible to request additional peripheral devices through their department administrator with justification



What can you expect?

- **Department Administrators will have some responsibility:**
 - Encourage staff to be responsive and respect deadlines
 - Help to provide timely response to selection requests
 - Determine that requests are necessary and within reason
 - Work with HUIT when follow up is needed
- **Timeline**
 - November/December/January
 - FAS Leadership will set expectations
 - HUIT will continue to procure equipment to avoid supply chain issues
 - HUIT will begin to communicate with Department Contacts and include:
 - List of eligible desktops that can be refreshed with laptops
 - Deadline for responses
 - Spring Semester
 - Work to finalize computer selections
 - Schedule computer deployments and peripheral distributions
 - Continue to order equipment and ensure there is enough to meet demand



Concur Update

As of November 9th, Concur migrated to a new payment processor (Bambora) for “out of pocket” direct deposit payments. Users must complete a one-time opt-in process to continue to receive out-of-pocket reimbursements. The opt-in process authorizes Bambora to make deposits using your existing banking information in Concur.

- Banking details do not need to be re-entered
- Delegates cannot opt in on your behalf
- Cannot be done through the mobile app
- For more information, please review the [complete Bambora Opt-In Instructions](#)



Happy Thanksgiving!



Please feel free to send thank you notes to colleagues using the [virtual Giving Thanks card](#).

Contact Kat Bliss at ksbliss@fas.harvard.edu should you have any questions.