

UNIVERSITY OF WISCONSIN
SERVICE CENTER

Affinity Group 3

October 7, 2014

The Service Center Mission is to provide “best in class” HRIS and customer service to support the effective management of the University of Wisconsin System’s Human Capital at the highest value.

Today's Agenda

- ▶ Institution Feedback & Updates
 - ▶ ABE
 - ▶ R1Y Event
 - ▶ Duplicate Person Entry
 - ▶ Calendar Review
 - ▶ Questions / Comments
- 

Institution Feedback & Updates

- ▶ UW–Green Bay
 - ▶ UW–Parkside
 - ▶ UW–River Falls
 - ▶ UWSA
 - ▶ UW–Stout
 - ▶ UW–Superior
 - ▶ UW Colleges
 - ▶ UW–Extension
- 

TSA Quick Enrollment Forms

- ▶ To simplify the TSA enrollment process, we are testing TSA Quick Enrollment forms.
- ▶ Fidelity and T. Rowe Price have agreed to work with us to try these out.
- ▶ If employee fills out quick enrollment form, the employee will be enrolled in the appropriate Target Retirement Date fund based on employee's date of birth.
- ▶ Printed copies will be available at the company tables **at the Benefits Fairs.**

Fidelity Quick Enrollment Form



**GET IN THE GAME
THE QUICK & EZ WAY**



EZ Enroll for the UW Tax-Sheltered Annuity 403(b) Plan at Fidelity Investments (#82828)

Just fill in the EZ INFORMATION below and return this form to your UW Institution's Benefits Office to GET IN THE GAME and begin participating right away. *Because the time is NOW.*

Please enroll me in the UW Tax-Sheltered Annuity 403(b) Plan at the rate selected below. I understand that until I make a change, the money I contribute will be invested in the Fidelity Freedom K[®] Fund based on my date of birth. Fund details are available online at <http://plan.fidelity.com/uofw>.

My Pretax Election (Please note that Roth contribution elections will not be accepted through this form):

Please begin my pretax contributions at _____% (from 1% to 100%)

OR

Please begin my pretax contributions at \$_____ (must be in whole dollar increments starting at \$1.00)

I understand that the UW TSA 403(b) Plan offers a number of investment options for my retirement savings and that I can go online to <http://plan.fidelity.com/uofw> to view details about the Plan and the investment options available to me. I know I can change my investment elections at any time.

My Name: _____

My Date of Birth: _____ My Employee ID (or Last 4 of SSN): _____

My Mailing Address: _____

My Email Address: _____

Signature: _____ Date Signed: _____

Please fill in all the information requested above, then return this form to your UW Institution's Benefits Office to GET IN THE GAME NOW. Enrollments and deductions from your paycheck will be processed as soon as administratively feasible. For questions, contact Rose Stephenson at UW System Administration Human Resources. She can be reached at 608-262-5564 or rstephenson@uwsa.edu.

It is your responsibility to select and monitor your investments to make sure they continue to reflect your financial situation, risk tolerance, and time horizon. You should reexamine your strategy at least annually or whenever your financial situation changes. You may also wish to consult a financial advisor.

Please complete this form and return to a Fidelity Representative or your UW Institution's Benefits Office

FOR OFFICE USE ONLY:

Date Received: ____/____/____ Input By: _____ Plan #: 82828

UW Human Resources Only: Please email or fax the completed form to Rose Stephenson: rstephenson@uwsa.edu or 608-265-9834.

Fidelity Investments Institutional Operations Company, Inc. 245 Summer Street, Boston, MA 02210
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T Rowe Price Quick Enrollment Form

START SAVING FOR THE FUTURE TODAY. IT'S SO IMPORTANT. AND SO EASY.

Your UW TSA Plan is a great benefit that can help you plan for your future. It's up to you to take the first step, and now it's easier than ever.

Benefits of saving in the UW TSA 403(b) Plan

Before-tax savings

You can lower your current taxable income because contributions go into your account before taxes are taken out.

Power of compounding

Compounding occurs when any earnings on your investments are put back into your account, so they have the chance to continue growing. The longer you stay invested, the more potential compounding has to increase the value of your account.

Investment choice

The plan offers several investment options to choose from for building your portfolio.

Access

You have convenient, 24-hour access to your account online or by phone.

For more information about your plan or investment options, visit the website at rps.troweprice.com or call 1-800-922-9945.

Call 1-800-922-9945 to request a prospectus, which includes investment objectives, risks, fees, expenses, and other information that you should read and consider carefully before investing.

The principal value of the Retirement Funds is not guaranteed at any time, including at or after the target date, which is the approximate year an investor plans to retire (assumed to be age 65) and likely stop making new investments in the fund. If an investor plans to retire significantly earlier or later than age 65, the funds may not be an appropriate investment even if the investor is retiring on or near the target date. The funds' allocations among a broad range of underlying T. Rowe Price stock and bond funds will change over time. The funds emphasize potential capital appreciation during the early phases of retirement asset accumulation, balance the need for appreciation with the need for income

HOW YOU CHOOSE THE FUNDS

If you were born...	You might consider the following Retirement Fund.
In 1988 or after	» Retirement 2055 Fund
1983 – 1987	» Retirement 2050 Fund
1978 – 1982	» Retirement 2045 Fund
1973 – 1977	» Retirement 2040 Fund
1968 – 1972	» Retirement 2035 Fund
1963 – 1967	» Retirement 2030 Fund
1958 – 1962	» Retirement 2025 Fund
1953 – 1957	» Retirement 2020 Fund
1948 – 1952	» Retirement 2015 Fund
1943 – 1947	» Retirement 2010 Fund
1938 – 1942	» Retirement 2005 Fund
In 1937 or before	» Retirement Income Fund

Depending on your risk tolerance and time horizon, you may consider a Retirement Fund with a different target date.

What you need to do

Simply fill out the attached card and return it to a T. Rowe Price representative, or your local UW Human Resources office. For questions, please contact Rose Stephenson at 1-608-262-5564.

as retirement approaches, and focus on supporting an income stream over a long-term postretirement withdrawal horizon. The funds are not designed for a lump-sum redemption at the target date and do not guarantee a particular level of income. The funds maintain a substantial allocation to equities both prior to and after the target date, which can result in greater volatility over shorter time horizons.

I'M READY TO START.

Enroll me in the University of Wisconsin Tax-Sheltered Annuity 403(b) Plan. Please deduct _____% of my before-tax pay* (Whole percentages from 1% to 100% only—subject to IRS annual contribution limits.) Deductions from my pay will be made as soon as administratively possible. Invest my contributions in the T. Rowe Price Retirement Fund (a diversified retirement portfolio) with the target date closest to the year I turn 65—see chart. (Depending on your risk tolerance and time horizon, you may consider a Retirement Fund with a different target date.) I understand that once my account is established I can change my contribution amount at any time by contacting UW. I may also change my investment election by contacting T. Rowe Price at 1-800-922-9945 or by visiting the website at rps.troweprice.com.

Name _____ Birth date _____ Employee ID or Last four of SSN _____

Phone number _____ E-mail address _____

Signature _____

You can also enroll in different investment options by visiting the website at rps.troweprice.com or by calling T. Rowe Price at 1-800-922-9945.

* Any mandatory deductions will be taken out before salary deferral.

Please complete and return this form to the T. Rowe Price representative, or your local UW Human Resources office. For questions, please contact Rose Stephenson at 1-608-262-5564.

T. Rowe Price Investment Services, Inc., distributor,
T. Rowe Price mutual funds.

TSA Quick Enrollment Forms

- ▶ If the institution receives the original:
 - Fax a copy to Rose Stephenson at 608-265-9865
 - Use the form to enter the employee's deduction and save it in their file.
- ▶ If Rose gets the original, she will fax a copy to the institution, so the institution can:
 - enter the deduction and
 - file in the participant's file.
- ▶ Rose and Terry will:
 - make sure the employee's account is established with the company.
 - send the employee a confirmation e-mail -- and cc the institution.

TSA Quick Enrollment Confirmation

Enrollment confirmation email will:

- ▶ let employees know that their deduction has been entered and an account has been established
- ▶ tell them how to establish online access to their account
- ▶ remind them to choose a beneficiary -- they can do it online
- ▶ provide language from the back of the Salary Reduction Agreement, so they have all the legal stuff
- ▶ remind them
 - that they can submit a Salary Reduction Agreement at any time to change or stop their deferral and
 - that to change their investment mix they can go online to their account or simply contact the company

ABE Resources

- ▶ ABE website: <http://www.uwsa.edu/abe/>
(brochure and PPT here)
- ▶ ABE Administrator website:
<http://www.uwsa.edu/ohrwd/admin/benefits/abe/>
- ▶ ETF It's Your Choice Landing Page:
http://etf.wi.gov/members/IYC2015/IYC_State_home.html
- ▶ ETF's FSA Page:
http://etf.wi.gov/members/benefits_era.htm
- ▶ TASC FSA Enrollment Page:
<https://www1.tasconline.com/enrollment/>
- ▶ TASC HSA Enrollment Page:
<https://tascparticipant.lh1ondemand.com/>

ABE – Significant Updates

- ▶ Employees who enroll in an HDHP for 2015 must enroll for the HSA by December 31, 2014.
- ▶ Employees who elect an HDHP/HSA for 2015 must exhaust all funds in their Healthcare FSA by December 31, 2014.
- ▶ TASC commonly references FlexSystem® in FSA materials.

ABE – Significant Updates

- ▶ Employees who enroll in an HDHP for 2015 must enroll for the HSA by December 31, 2014.
- ▶ If not enrolled by December 31, 2014, employee is not eligible for the HDHP for 2015.
- ▶ To reduce late enrollments, ABE materials have October 31 deadline.
- ▶ UWSC and TASC will audit for ineligible enrollments after ABE. May delay deposit of HSA contributions.

ABE – Significant Updates

- ▶ Do not enter paper applications received for HDHP enrollments in HRS until you verify that the employee has an HSA.
- ▶ You will need to verify the HSA enrollment via TASC. **Instructions to come.**
- ▶ Once HSA enrollment is verified, enter the HDHP enrollment.
- ▶ eBenefits enrollments for HDHPs will be audited for HSA enrollments.
- ▶ Includes craftworkers – must have HSA but get no employer HSA contribution.

ABE – Significant Updates

- ▶ Employees who elect an HDHP/HSA for 2015 must exhaust all funds in their Healthcare FSA by December 31, 2014.
 - Cannot roll remaining funds into Limited Purpose FSA (LPFSA). This will be an option next year when we move from the FSA grace period to the FSA rollover.
 - ETF will contact employees who elect an HDHP and have remaining funds in their 2014 Healthcare FSA. Funds must be exhausted or they will be ineligible for the HDHP.

TASC Enrollment Process: FSAs

- ▶ Employees will enroll online directly with TASC
(<https://www1.tasconline.com/enrollment/>)
- ▶ Since TASC is a new vendor for the UW, they will need to create an online account.
- ▶ When they first create their account, they will need to provide the UW's Client/Employer ID.

**UW's Client/Employer ID number is
4607-6190-4348**

TASC Enrollment Process: FSAs

- ▶ After entering the Employer ID and their email address, the employee will receive an email from TASC that includes their TASC ID number and a link to complete the registration process (see the [TASC/FlexSystem® Participant Enrollment Guide](#) or [enrollment video](#) for details).
- ▶ Employees must submit their online enrollment to TASC by 11:59pm CST on October 31, 2014.

TASC Enrollment Process: FSAs

MyTASC Login | Contact Us | MyTASC Help | Logout



Home | Products | Partner | About TASC | Resources

New FlexSystem Account Request

Login | Set Password | Contact Information | **Enroll** | TASC Card | MyCash

Enroll

Enrolling is easy and takes only minutes!

Step 4 of 6 - NEW BENEFITS ENROLLMENT

Choose a plan in which to enroll

	Status	Plan Name	Start Date	End Date
<input type="radio"/>	SETUP	0000160687 FSA (Monthly) State of WI - ETF Univ of WI - POC	01-01-2015	12-31-2015
<input type="radio"/>	SETUP	0000160688 LPPFSA (Monthly) State of WI - ETF Univ of WI - POC	01-01-2015	12-31-2015
<input type="radio"/>	SETUP	0000160689 FSA (Bi-Weekly) State of WI - ETF Univ of WI - POC	01-01-2015	12-31-2015
<input type="radio"/>	SETUP	0000160690 LPPFSA (Bi-Weekly) State of WI - ETF Univ of WI - POC	01-01-2015	12-31-2015

How much can you save?

Find out how much you can save using FlexSystem's Savings Calculator »



TASC Election Screen for HSA and LPHSA

TASC Enrollment Process: FSAs



Home Products Partner About TASC Resources

New FlexSystem Account Request

Login Set Password Contact Information **Enroll** TASC Card MyCash

Enroll

Enrolling is easy and takes only minutes!

Step 4 of 6 - NEW BENEFITS ENROLLMENT

Current Plan Information

Status	Plan Name	Start Date	End Date
SETUP	0000160689 FSA (Bi-Weekly) State of WI - ETF Univ of WI - POC	01-01-2015	12-31-2015

Enroll in plan beginning 01-01-2015? Yes No

Waive all benefits? Yes No

Medical (Out-of-Pocket) Expenses

Dependent Care Expenses

Transit Expenses

Parking Expenses

Annual Salary Reduction Election	Estimated Annual Savings**
0.00	0.00
0.00	0.00
0.00	0.00
0.00	0.00

**Based on average 28% savings.

Submit

Cancel

How much can you save?

Find out how much you can save using FlexSystem's Savings Calculator >



TASC Enrollment Process – FSA

- ▶ Employees requesting paper applications will be directed to their benefits office for the application. Paper enrollments must be submitted to the benefits office by 4:30pm on October 31, 2014.
- ▶ For FSA enrollment assistance, employees can call FlexSystem® Customer Care at 1-800-422-4661 between 8:00 am and 5:00 pm (note this contact number is different from the HSA number).

TASC Enrollment Process: HSAs

- ▶ To enroll in a TASC HSA, employees must visit <https://tascparticipant.lh1ondemand.com>.
- ▶ As with enrollment for the FSAs, employees will enroll in the HSA online directly with TASC.
 - Will need to provide SSN or Employee ID Number
 - Will need to have an email account
- ▶ When they first create their HSA account, they will need to provide the UW's Client/Employer ID.

UW's Client/Employer ID number is


4607-6190-4348

- ▶ TASC HSA Customer Service: 1-800-350-3778
(different than FSA contact number)

ABE Enrollment Errors

- ▶ Correcting enrollment errors:
 - ETF is discussing the timeframe and process for correcting enrollment errors (example: employee enrolls in HDHP/HSA when not eligible).
 - Employee may rescind ABE health insurance elections by December 31 and remain with their current plan.
 - Changes to FSA elections may be corrected after ABE ends but before December 31, however, changes must be approved by ETF. Late enrollments (employee made no FSA election during ABE) must be appealed to ETF.

ABE Updates – Uniform Dental

- ▶ Dean Prevea 360 is changing its dental network to include Delta Dental providers.
 - ▶ WEA Trust is expanding its dental network to include Delta Dental providers.
 - ▶ The current WEA dental network providers will still be available for next year unless otherwise noted in WEA's member letters that identify changes.
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Additional ABE Materials

- ▶ Employee Checklist created. Posted on ABE site. May want to provide at benefits fairs.
- ▶ Paper TASC enrollment forms will be posted online on the UWSA Benefits Administrative site.

UIA Annual Deduction

UIA Deduction Taken on October Payroll (paid 10-31-14)

Eligibility

- Faculty, Academic Staff and Limited Appointees
- Must re-qualify on an annual basis, meeting the salary threshold and be actively employed as of October 1st of the deduction year
- 2014-15 Threshold **\$2,789** per month

LUMP SUM and AD HOC (Zero Dollar) appointments are NO LONGER factored into the monthly salary.

UIA Annual Deduction

- ▶ Those who had coverage last year but did not qualify this year, will be sent Conversion information from the institution (list provided to you last Friday). Conversion Notices should be sent no later than TODAY.
 - *Employees who converted to an individual plan with MN Life and re-qualify in subsequent years MAY have both plans as long as premiums are paid in both.*
- ▶ Employees on LOA that meet the annual qualifications will be sent a Benefits Billing Statement by UWSA.
 - Payments must be postmarked no later than Dec 1, 2014 or the employee will not have coverage for the 2014-15 plan year and will have to re-qualify next October

UIA Annual Deduction

UWSA-Service Center Responsibilities:

- ▶ UWSA Service Center will receive Benefits Billing Payments
- ▶ Enter into Benefit Billing, and cash payment
- ▶ Staff will update HRS to reflect the Benefits Billing Payment
- ▶ For questions or concerns, contact Kara Webber: kwebber@uwsa.edu or 608-263-7559

Questions?



R1Y Event Processing

- The UWSC moved all employees currently enrolled into Imputed Income (1Y) into their new Health Insurance coverage codes effective 1 / 1 / 2015.
- The UWSC moved all Self-Service employees currently enrolled into EPIC Benefits+ with Employee+1 or Employee+2 coverage into their new coverage codes effective 1 / 1 / 2015.

R1Y Event Processing

- The UWSC will be moving all non Self-Service employees currently enrolled into EPIC Benefits+ with Employee+1 or Employee+2 coverage into their new coverage codes effective 1 / 1 / 2015 over the next two weeks.
- The R1Y event must be processed before any OE enrollments are entered.

R1Y Event Processing

On-Demand Event Maintenance

Person ID: 00000120 Ben Rcd#: 0

Activity Date: Source: Empl Rcd#: 0
Schedule/Prepare Activity Pending Activities: 0 Show Activities Action:

Event ID: 4 Event Date: 01/01/2015 Status: Prepared Class: R1Y Event Status Update
Prepare Options Event Status: Open for Processing

Enrollment Statement Run Date: Frequency
Election Entry Entered 0 of 4 Deduction Annual
Validate/Finalize Errors 0 Show Plans Show Errors Finalize/Apply Defaults
Confirmation Statement Run Date:

Reprocess Process Indicator: N Normal Processing

Save Return to Search Notify

The R1Y event prepared and open for ERIC Benefits+ (Plan Type 12).

Questions?



Duplicate Person Match

- ▶ Reminder from HR/TAM Team:
 - Complete the Person Match via HRS/EPM query to ensure that the person doesn't already exist.
 - We are seeing a larger number of employees being added who already exist which requires us to process more person merges.
 - This not only impacts our office but also impacts the employee's access to SFS at times.

October Calendar Review

October 2014

Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	1 [9M] Pay Date [10M] Pay Period Begin	2 [9B] Pay Date	3	4 [10A] Pay Period End
5 [10A] 1st Batch Prelim Calc [10B] Pay Period Begin	6 [10A] 2nd Batch Prelim Calc	7 [10A] 3rd Batch Prelim Calc	8 [10A] 4th Batch Prelim Calc [10A] FICA Deadline	9 [10A] Confirmation Deadline (Eve) [10A] Final Calc	10 [10M] 1st Batch Prelim Calc	11
12 [10M] 2nd Batch Prelim Calc	13 [10M] 3rd Batch Prelim Calc Columbus Day [Federal Reserve Bank Holiday]	14 [10M] 4th Batch Prelim Calc	15 [10M] 5th Batch Prelim Calc [10M] FICA Deadline	16 [10M] Final Calc [10M] Confirmation Deadline (Eve) [10A] Pay Date	17	18 [10B] Pay Period End
19 [11A] Pay Period Begin [10B] 1st Batch Prelim Calc	20 [10B] 2nd Batch Prelim Calc	21 [10B] 3rd Batch Prelim Calc	22 [10B] FICA Deadline [10B] 4th Batch Prelim Calc	23 [10B] Confirmation Deadline (Eve) [10B] Final Calc	24	25
26	27	28	29	30 [10B] Pay Date	31 [10M] Pay Period End [10M] Pay Date	1