UNIVERSITY OF WISCONSIN
SERVICE CENTER

Affinity Group 3
November 4, 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

- Welcome
- Dynamic F Groups – Security
- November & December Payroll Schedules & Deadlines
- Calendar Year End
- Same Sex Marriage Update
- Benefit Flag Query
- WRS Accumulator
- Annual Benefit Enrollment Update
- Reminder – Absence Management
- Institution Feedback & Updates
- Calendar Review
- Questions/Comments

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Dynamic F Groups

- The TL_GRP_RFRSH job runs nightly and averages between 5 and 9 Hrs to run to completion. The primary reason the job runs so long is that one of the tables (PS_TL_GROUP_DTL) the job accesses currently has over 30 million rows.

- The current best option is to reduce the number of records in the PS_TL_GROUP_DTL table. The primary reason that there are so many records in the PS_TL_GROUP_DTL table can be tied to the number of users that have both UWS row level security and the dynamic payroll coordinator security role.

- Each night the TL_GRP_RFRSH job runs and rebuilds all the dynamic groups in HRS. Users that have the dynamic payroll coordinator security role and UWS row level security are getting a 'F' dynamic group built containing over 300,000 employees. There are currently 73 users who have both the dynamic payroll coordinator security role and UWS row level security. As a result, these 73 users account for over 22 million of the 30 million records in the PS_TL_GROUP_DTL table.

Dynamic F Groups

- The TL_GRP_RFRSH job has been increasing its run times since go live, but it didn't abend until two weeks ago.   73 users account for almost 75% of the records in the PS_TL_GROUP_DTL table. We would like to verify if there is really a business need to continue with the users current security setup.

- The options we have to reduce the number of 'F' dynamic Groups being built each night with over 300,000 employees are:

  - 1. Remove the user from all Active TL Security pages, which will result in the user not having a 'F' dynamic group to be built.
  - 2. Change the user's UWS row level security to another lower row level security (Campus, Dept, etc), which will result in a 'F' dynamic group still being built, but with a considerably lower number of employees.

- Either one of these options will result in reducing the number of users that are having a 'F' dynamic group built each night with over 300,000 employees.

Dynamic F Groups

- Discussion with Neal Wermuth (Time & Labor Team)

2014BW11B

- Saturday, November 15 *Overnight*
  - 11B paysheets created
- Monday, November 17
  - Payline request deadline – 4:30pm
  - Retro/payline load to payroll (overnight)
- Tuesday, November 18 – FICA deadline - Noon
- Wednesday, November 19 – 11B confirm - Noon

2014UNC11

- **Thursday, November 20 *Overnight***
  - 11M paysheets created
- **Friday, November 21**
  - Payline request deadline – 4:30pm
- **Saturday, November 22**
  - Retro/payline load to payroll (overnight)
- **Sunday, November 23**
  - FICA deadline – Noon {*Submit early (Friday) if possible*}
- **Monday, November 24**
  - 11M confirm – **10:00am**

2014BW11C

- Sunday, November 30th
  - 11C Paysheets Created
- Tuesday, December 2nd
  - Payline request deadline – 4:30pm
  - Retro/payline load to payroll (overnight)
- Wednesday, December 3rd
  - FICA deadline – Noon
- Thursday, December 4th
  - 11C Final Calc & Confirm – Noon

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2014BW12A

- Friday, December 12 *Overnight*
  - 12A paysheets created
- Monday, December 15
  - Payline request deadline – 4:30pm
  - Retro/payline load to payroll (overnight)
- Tuesday, December 16 – FICA deadline - Noon
- Wednesday, December 17
  - 12A confirm – **10:00am**

2014UNC12

- Thursday, December 18 ***Overnight***
  - 12M paysheets created
- Friday, December 19
  - Payline request deadline – 4:30pm
- Saturday, December 20
  - Retro/payline load to payroll (overnight)
- Sunday, December 21
  - FICA deadline - Noon {*Submit early (Friday) if possible*}
- Monday, December 22 – 12M confirm - Noon

2014BW12B

- Friday, December 26 – 12B paysheets created
- Sunday, December 28
  - Retro/payline load to payroll (overnight)
- Monday, December 29
  - Payline request deadline – Noon
    - {*Submit early (Friday) if possible*}
  - FICA deadline - Noon
- Tuesday, December 30 – 12B confirm - Noon

Important Year-End Payroll Dates - 2014

Date	Event
12/01/2014	Last on-cycle pay date in 2014 for monthly paid staff
12/17/2014	Check Correction deadline to guarantee employees' original W-2s reflect the correct amounts
12/23/2014	Last on-cycle pay date in 2014 for bi-weekly paid staff
12/26/2014	NOON – Deadline for Missed Payroll submissions for inclusion on 2014 W-2s
12/30/2014	Last off-cycle check date for 2014 (bi-weekly and monthly paid staff)
01/02/2015	Final deadline for last minute Check Correction adjustments on an employee's W-2 (not guaranteed, based on volume)
01/09/2015	Deadline for Taxable Fringe Adjustments for calendar year 2014
01/20/2015	Targeted print date for 2014 W-2s
01/23/2015	Targeted print date for 2014 Fellowship/Scholarship Letters
01/29/2015	Targeted date for employees to begin receiving 2014 W-2s and Fellowship/Scholarship Letters
01/31/2015	IRS postmark deadline for employees 2014 W-2s
02/23/2015	Targeted print date for 2014 1042-S forms
03/01/2015	CYE posts to WISDM (approximately)
03/02/2015	Targeted date for employees to receive 2014 1042-S forms

Funding Issues Related to Calendar Year End (CYE) Payroll

- Each year the Service Center processes a calendar year end payroll (CYE) in late February. This payroll posts to WISDM by approximately March 1.
- Examples of items included in the CYE payroll that will result in WISDM accounting entries are:
  - Monthly employees off cycle payrolls paid after the 11M final calc date (this year Nov. 24) and before 1/1/2015
  - Biweekly employees off cycle payrolls paid after the 12B final calc date (this year Dec. 17) and before 1/1/2015
  - Employer share taxable payments and fringes (e.g., taxable ERA, Athletics taxable fringes, taxable meals and reimbursements made on expense accounts, etc.) not previously posted in WISDM
  - Other late payroll adjustments

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Funding Issues Related to Calendar Year End (CYE) Payroll

- What do I need to know about funding for the CYE payroll?

  - Sponsored projects offices, grant accountants, controllers and fiscal representatives have expressed concerns about calendar year end funding issues.

  - An off cycle payment made in November/December on expired or expiring funding will not be posted in WISDM for several months. Efforts should be made to include these payments on or before the November monthly or 12B biweekly payrolls.

  - Large numbers of CYE related payments can be expected to go to default or suspense funding if funding is not in place. Salary cost transfers are then required, including those for very small amounts (often less than $1.00).

Funding Issues Related to Calendar Year End (CYE) Payroll

- What should I do?
  - Ensure all employees have active, valid funding in place.
  - Ensure valid department level funding is in place for every appointing department, even if salaries are not normally paid. This provides a "stopgap" funding.
  - Ensure fiscal year 2015 funding is in place for any terminated employee who may have transactions processed in the CYE payroll.
  - Watch for updates on CYE funding issues and make recommended funding entries.
  - Share this information with persons on your campus responsible for grant management and fiscal issues.
  - Share this information with persons on your campus who may have outstanding salary payments that will need to be made by the end of the calendar year.

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Funding Issues Related to Calendar Year End (CYE) Payroll

- Links to campus controller's offices and sponsored projects/grant accountants:
    - Controllers: http://www.uwsa.edu/fadmin/direct/control.htm
    - Sponsored projects/grant accountants offices: http://www.uwsa.edu/fadmin/direct/gratacct.htm

Questions?

Same-Sex Marriages

Prior to October 6th –

　　If married prior to October 6th and communication has not been given to Tier 3 Benefits team, please contact Lisa Tesch through WiscIT

　　October 6th forward – same sex marriages will be processed the same as opposite sex marriages.

- No special documentation needed
- Application should indicate marriage
- New Hires can file applications or enroll through e-Benefits to cover their spouse

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HRS Entry for Same-Sex Marriage Updates

Employee had a covered domestic partner prior to October 6th

- Employee was placed into coverage code 41 or 42 for Health Insurance during open enrollment with an effective date of 1/1/2015.

- Two ADM events will need to be processed.

  - The first ADM event will enroll the spouse in benefits based on marriage date.

  - The second ADM event effective 1/1/2015 will change to coverage code back to 15 to prevent imputed income charges

  NOTE: Please process ADM events oldest to newest

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Benefit Flag Query

Location of Query: Reporting Tools > Query > Query Viewer

Name of Query: UW_BN_MISSING_PRIMARY (private query shared by Joanna Bauer)

What does the query identify: An active employee where the benefit flag is currently setup on the inactive Empl Rcd.

Who should be fixed: Everyone needs their benefit flag correctly setup on the active Empl Rcd to ensure employees are correctly enrolled into a Benefit Program and offered benefits.

Benefit Flag Query

How to fix:

1. Review Job Data to determine where benefit flag should be

2. Change the benefit flag on the Maintain Flags
   - Benefits > Maintain Primary Jobs > Maintain Flags

3. Run the Populate Eligibility Config process to update benefit eligibility
   - Benefits > Manage Automated Enrollment > Events > Populate Eligibility Config

4. Review and reprocess events on the effective date to ensure enrollment into the correct Benefit Program

Benefit Flag Query

Institutions will be notified of any benefit flags fixed by the UW Service Center Benefits Team that impact eligibility through:

- WiscITs (if event is finalized)
- MSC Event Evaluation Report

- Benefits Team is targeting possible WRS eligibility changes

WRS Accumulator

Security Role: BN WRS View Access

Location of page: Benefits > Reports > Regulatory and Compliance > WRS Accumulator

What is the page: The page records WRS eligible earnings and hours for WRS Lookback review and WRS reporting.

WRS Accumulator

Benefit Plan: Displays WRS earnings and hours per WRS benefit plan

- NON = Employee is currently not enrolled into WRS
- GEN = General Retirement
- TEA = Teacher Retirement
- PRO = Protective Retirement
- EXC = Executive Retirement

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WRS Accumulator

WRS Accumulator

ID:

Plan Type:	WRS	Wisconsin Retirement System
Benefit Plan:	NON	
Coverage Begin:		Coverage End:

Grid icon will export the data to excel

Personalize | Find | First

WRS Details | **Adjustment Details**

	Empl Rcd#	Pay Run ID	Pay Check Cal Year	Pay Period Begin Date	Pay Period End Date	Pay Check Date	WRS Earnings	Service Hours	Lump Sum Hours	7X Before Tax Ded	7X After Tax Ded	7Y Before Tax Ded
1	0	2011UNC04	2011	04/01/2011	04/30/2011	04/29/2011	1777.50	71.24	71.24			
2	0	2011UNC05	2011	05/01/2011	05/31/2011	06/01/2011	1777.50	71.24	71.24			
3	0	2011UNC06	2011	06/01/2011	06/30/2011	06/30/2011	556.66	22.31	22.31			
4	0	2011UNC07	2011	07/01/2011	07/31/2011	08/01/2011	556.66	22.31	22.31			
5	0	2011UNC08	2011	08/01/2011	08/31/2011	09/01/2011	556.66	22.31	22.31			
6	0	2011UNC09	2011	09/01/2011	09/30/2011	09/30/2011	1382.50	55.41	55.41			

Tip: Exporting the data to excel makes it easier to sum the hours over a year to determine if the employee should be eligible for WRS through Lookback.

Annual Benefit Enrollment Update

- <u>Flexible Spending and Health Savings Account Enrollment Deadline Extended to November 7</u>.

- The deadline to enroll in the Flexible Spending Account (FSA) Program, the Health Savings Account (HSA) and Transportation/Parking for 2015 has been extended through November 7th.

- In addition, the annual contribution limit for the Healthcare Flexible Spending Account and Limited Purpose Flexible Spending Account has increased from <u>$2,500 to $2,550</u>.

Annual Benefit Enrollment Update

- If an employee wants to participate in the Flexible Spending Account (FSA) for Healthcare or Dependent Day Care or the Parking and Transit program in 2015, employee must re-enroll in the program every year! Employees make their Healthcare FSA, Dependent Day Care FSA and/or Parking and Transit election on the TASC website.

- Employees must enter the UW's Employer ID number when you enroll: 4607-6190-4348.

Annual Benefit Enrollment Update

- Employees enrolled in a High Deductible Health Plan (HDHP) for 2015 must also enroll in a Health Savings Account (HSA). Employees are only eligible to enroll in the HSA if also enrolled in the HDHP. Employees enroll in the HSA at the TASC website.
  - You must enter the UW's Employer ID number when you enroll: TAS-WI1368.

- Individuals are not eligible to enroll in an HDHP/HSA if they are eligible for the Graduate Assistant/Short-Term Academic Staff benefits program.

Annual Benefit Enrollment Update

- Employees who enroll for an HDHP cannot have any funds remaining in their 2014 healthcare FSA as of 12/31/14. The Service Center will run another validation late in the year.

- SC will receive information and run validation in early January.

- This will likely delay the HSA employer contribution to the second payroll of 2015.

Annual Benefit Enrollment Update

- Employees already enrolled in one or more of the Flexible Spending Account programs or the Health Savings Account but want to change their election may:
  - Log in to their account to change the election amount but must re-enter all 2015 elections (Healthcare, Dependent Care, Parking/Transit). Employees may change their election online or may contact their benefits office with the new election amount (application) **no later than November 7th at 4:30pm**.

Annual Benefit Enrollment Update

- Employees enrolled in the 2014 Flexible Spending Account program or the Parking/Transit program will have a new vendor in 2015.

- WageWorks is the current administrator of the plan and TASC will be the administrator of the plan effective January 1, 2015. To ensure a smooth transition of your current account, please see the educational material on the Department of Employee Trust Funds website.

Reminder – Absence Management

- Please make sure Unclassified Leave Reports are turned in BEFORE an employee retires or terminates.

- The AM Team receives many sick leave certs that do not have all reports turned in.

- AM is unable to complete the removal of all Sick leave from HRS until all reports are turned in.

Institution Feedback & Updates

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

Calendar Review

November 2014

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

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