UNIVERSITY OF WISCONSIN SERVICE CENTER

Affinity Group 3 January 13, 2015

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

UNIVERSITY OF WISCONSIN

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SERVICE CENT

- Introduction
- 1A Payroll Confirm
- 2015 1A Absence Management Balances
- Benefit Billing Update
- Benefit Primary Flag
- Dependent Age 26 Processes
- Institution Feedback & Updates
- Calendar Review
- Questions/Comments

Payroll - 1A Payroll Confirm

Scheduled for <u>10:00 a.m.</u> on 1/15/15

Please be aware that the final calc/confirm for the January A (1A) biweekly payroll is beginning at 10:00 a.m. on Thursday, 1/15/15 rather than the usual noon start time because of time constraints on the financial processing of this payroll due to the Martin Luther King Jr. holiday. As a result, the 11:00 a.m. run of Time Admin on Thursday will be cancelled (the 9:00 a.m. run of Time Admin will still occur). Additionally, the 10:00 a.m. biweekly absence calc will be cancelled on Thursday morning, so the deadline for absence entry remains 8:00 p.m. on Wednesday, 1/14/15. The unclassified absence calc that normally runs at 11:00 a.m. will be moved to 9:00 a.m. Thursday morning.

Payroll - 1A Payroll Confirm

Important Note: Have all AM and TL entry done by Wednesday evening (1/14).

- The 1A period crosses over the calendar year of 2014/2015. Absence and Time and Labor (TL) have some limitations during this period. Legal Holiday can be problematic if not handled properly.
- Clear exceptions as soon as possible to avoid underpayment.
- If you plan to "NOHOL" and "FLHOL," please get your "NO HOL" entered as soon as possible to avoid potential issues. You should not enter NOHOL and FLHOL simultaneously at this time of year. Also at this time of year, the NOHOL likely needs the overnight process to put hours back in their balance before you can spend them with FLHOL. This has a high impact for part time employees.
- Check your LHA balances from 12B. If you have anyone with a Zero or negative balance, you MUST enter NOHOL for the New Year's Eve (12/31). If you don't the holiday will process and pay. The employee will owe this time back so please enter the NOHOL where appropriate. Time and Labor allocates 2015 legal holiday before Absence does causing the possibility of overpayment until the TL balances sync up with AM balances.
- In summary, have all Absence entry and TL entry done by Wednesday evening. Waiting until Thursday morning will be too late in most cases to make changes because AM won't run again and TL doesn't have 2 cycles of Time Admin running to make a change and approve it before confirm begins.

2015 1A Absence Management Balances

- When entering time for the 1A Payroll, employees will see balances that remain from the 12B Payroll.
- Allocations for 2015 (vacation, personal holiday, legal holiday) have been calculated and can be used during the 1A period, but will not appear in ESS Portal until after the 1A Payroll Confirm.
- Balances can be viewed in Absence Management:
 - https://kb.wisc.edu/page.php?id=19169

2015 Absence Management Balances

 Navigate to Global Payroll & Absence Mgmt > Absence and Payroll Processing > Review Absence/Payroll Info > Results by Calendar

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- Enter Empl ID and Search
- Select Calendar ID (HPR 201501A)
- View Accumulators Tab click View All

2015 Absence Management Balances

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- <u>Payee Status</u> - <u>Processing Statistics</u> Calendar Period UWS_C_LH_PTD_PENT 8.000000m Legal Holiday Period to Date 01/01/2015 01/10/2015
Chain Calendar Period UWS_C_SL_PAYEE 3.50000 Payee level accumulator 01/01/2015 01/10/2015
Calendar Period UWS_C_SL_PAYEE_MAX 5.000000 Max Class Sick Leave 01/01/2015 01/10/2015
Absence Conversion Calendar Period UWS_C_VN_AVL_BAL 220.500000 Vacation Available 01/01/2015 01/10/2015
Processing
- UW Paid Hours Inquiry
- <u>Calculate Absence and</u>
Payroll - Sabbatical Processing

Calendar Results | Accumulators | Supporting Elements

Menu

Benefit Time a Payroll Global Mgmt ▷ Paye Proc D De ▷ Pr ▷ Of ≂Re

Payroll Interface

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2015 Absence Management Balances

Mgmt	Year to Date	UWS_C_PH_BAL	36.000000 Personal Holiday Balance	01/01/2015	12/31/2015
▷ Payee Data	Year to Date	UWS_C_PH_ENT	36.000000 Personal Hol. Entitlement YTD	01/01/2015	12/31/2015
Absence and Payroll Processing	Year to Date	UWS_C_PH_LOSS	0.000000 Personal Holiday Lost	01/01/2015	12/31/2015
Define Calendars	Year to Date	UWS_C_PH_PENT	36.000000 Personal Hol (Class) Payee Ent	01/01/2015	12/31/2015
▷ Prepare Payroll ▷ Off Cycle	Year to Date	UWS_C_PRD_BAL	0.000000 Professional Development Bal	01/01/2015	12/31/2015
	Year to Date	UWS_C_SABELG_BAL	0.000000 Amount Eligible to Cnv to Sab	01/01/2015	12/31/2015
Info – <u>Payee Iterative List</u>	Year to Date	UWS_C_SAB_BAL	1020.000000 Sabbatical Balance	01/01/2015	12/31/2015
- Results by Calendar	Year to Date	UWS_C_SLADJ_BAL	0.000000 Current Period SL Adjustments	01/01/2015	12/31/2015
Group	Year to Date	UWS_C_SLT_BAL	1040.000000 Cls Sick Lv Threshold Balance	01/01/2015	12/31/2015
 Results by Calendar Administrator Results 	Year to Date	UWS_C_SL_BAL	1850.100000 Sick Leave Balance (class)	01/01/2015	12/31/2015
- Payee Messages	Year to Date	UWS_C_SL_ENT	3.500000 Cls Sick Leave Entitlement	01/01/2015	12/31/2015
 Payee Status Processing Statistics 	Year to Date	UWS_C_SL_ERN	1846.600000 Sick Leave Bal (avail to use)	01/01/2015	12/31/2015
- Element Resolution	Year to Date	UWS_C_SL_YTD_BAL	3.500000 Sick Leave YTD Bal (earn-used)	01/01/2015	12/31/2015
Chain Danata	Year to Date	UWS_C_VC_BAL	4.500000 Vacation Carryover Balance	01/01/2015	12/31/2015
▷ Reports ▷ Absence Conversion	Year to Date	UWS_C_VC_TAKE	8.000000 Vacation Carryover Takes YTD	01/01/2015	12/31/2015
Processing	Year to Date	UWS_C_VNA_BAL	216.000000 Vacation Allocation Balance	01/01/2015	12/31/2015
- <u>UW Paid Hours Inquiry</u> - Calculate Absence and	Year to Date	UWS_C_VNA_ENT	216.000000 Vacation Allocation Entitlemnt	01/01/2015	12/31/2015

Benefit Billing

Delinquency Process Template Letters

Delinquency Process

Refer to the Benefit Billing Process Schedule/Calendar

Institution Deadline for Benefits Billing Enrollment	Billing Period (YYMM)	Coverage Month/Year	E-mail Reminder Sent to Institutions	Service Center Calculates Charges and Reviews Processing Results	Final Benefits Billing Calc. Date	Invoices Printed & Mailed
12/15/2014	1501 - January	February 2015	12/05/2014	12/15/14 - 12/17/14	12/18/2014	12/19/2014
01/19/2015	1502 - February	March 2015	01/02/2015	01/19/15 - 01/21/15	01/22/2015	01/23/2015
02/16/2015	1503 - March	April 2015	02/06/2015	02/16/15 - 02/18/15	02/19/2015	02/20/2015
03/16/2015	1504 - April	May 2015	03/06/2015	03/16/15 - 03/18/15	03/19/2015	03/20/2015
04/13/2015	1505 - May	June 2015	04/03/2015	04/13/15 - 04/15/15	04/16/2015	04/17/2015
05/18/2015	1506 - June	July 2015	05/01/2015	05/18/15 - 05/20/15	05/21/2015	05/22/2015
06/15/2015	1507 - July	August 2015	06/05/2015	06/15/15 - 06/17/15	06/18/2015	06/19/2015
07/20/2015	1508 - August	September 2015	07/03/2015	07/20/15 - 07/22/15	07/23/2015	07/24/2015
08/17/2015	1509 - September	October 2015	08/07/2015	08/17/15 - 08/19/15	08/20/2015	08/21/2015
09/14/2015	1510 - October	November 2015	09/04/2015	09/14/15 - 09/16/15	09/17/2015	09/18/2015
10/19/2015	1511 - November	December 2015	10/02/2015	10/19/15 - 10/21/15	10/22/2015	10/23/2015
11/16/2015	1512 - December	January 2015	11/06/2015	11/16/15 - 11/18/15	11/19/2015	11/20/2015
12/14/2015	1601 - January	February 2016	12/04/2015	12/14/15 - 12/16/15	12/17/2015	12/18/2015

Delinquency Process

- 1. LOA Benefit Notice provided to employee by institution
- 2. Benefit Billing enrollments created in HRS by institution
- 3. Invoices created and mailed once per month on Friday by UWSC
- 4. Employee has until the 10th of the following month to pay
 - We collect 1 month in advance. I.e. January 1501 charges are for the February coverage and due by 1/10/15.
- 5. Around the 12th the UWSC creates the Delinquency Report and forward to the AGs for review and comment
- 6. Around the 15th the UWSC distributes the Delinquency Report to the institutions
- 7. The institutions have 5 days to respond to the UWSC
- 8. The institutions should contact employees Payment Due Memo
- 9. UWSC takes appropriate actions by end of month. This can mean cancellation of the insurances
 - UWSC will cancel the coverage in HRS and MyETF
- **10.** UWSC sends out follow-up to Delinquency Report informing institutions what actions have been taken
- 11. If necessary institutions will contact employees about cancellations Lapsed Insurance Memo
- 12. Institution should counsel employee about their reinstatement rights 30 days with payment in full

Delinquency Template Letters for LOA

- Three template letters will be used for notification to the employee during the delinquency process.
 - 1st letter Leave of Absences (LOA) Benefit Notice
 - Included with this letter will be the checklist for the employee to complete and return indicating what they wish to happen to their insurances while on a LOA
 - 2nd letter Payment Due Memo used for past due insurance premiums
 - Should follow a telephone call to employee regarding delinquent charges
 - 3rd letter Lapsed Insurance Memo used to notify employee payment has not been received and insurance coverage lapsed.
 - Should follow a telephone call to employee regarding lapsed coverage

Process Reminders

- Best Practices
 - Counsel employee before LOA (or ASAP when informed of LOA)
 - Be sure to explain when SGH and ICI premiums change to full premium paid by employee
 - Explain when the employer share of the premium starts again
 - Must be back in work status for 30 days at least 50%
 I.e. Return 1/5/15, 30 days will be 2/4/15, so employer share will start with the February coverage as long as they averaged 50%
 - Counsel employees on a LOA if coverage lapses for nonpayment and they want to reinstate
 - Discuss premiums for reinstatement and must be paid in full within 30 days. NO PAYMENT PLANS
 - Discuss premiums for future coverage months
 - Counsel employees on returning from LOA if they allowed their coverage to lapse
 - Employee has 30 days to submit an application to reinstate. UNIVERSITY OF WISCONSIN

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Benefit Billing

- Will be coming:
 - Template letters for Termed and Insufficient Pay Employees
 - Policy clarification for both Termed and Insufficient Pay Employees

Benefits Billing Review Charge Summary by Bill Period HRS > Benefits> Benefits Billing > Calculate and Review Charges > Rvw Charge Smry by Bill Period

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Benefits Billing On-Demand Delinquency Report HRS > Benefits> Benefits Billing > Reports > Delinquent Accounts

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This is an additional tool you may use in conjunction with the monthly Delinquency Reporting Process.

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Benefit Primary Flag AGENDA

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- Project Overview
- Upcoming Changes
- Deployment Timeline
- Questions?

Benefit Primary Flag PROJECT OVERVIEW

- Project Purpose
 - To more accurately assign the Benefit Primary Flag in multiple active job scenarios
- Project Goals
 - Enhance the current logic used to assign the Flag
 - Add a WED feature to identify the population of employees whose Flag needs to be reviewed by a Benefits Administrator

Benefit Primary Flag UPCOMING CHANGES

Every 15 minutes, enhanced logic will run to assign the Benefit Primary Flag to the most eligible active job (based on FTE, Empl Class, and Pay Basis).

Example

1

An employee has two active jobs: LI (.25 FTE) and FA (.25 FTE). If the FTE of the FA job increases to .75, the new logic will assign the Benefit Primary Flag from the LI job to the FA job.

Benefit Primary Flag UPCOMING CHANGES

2	Each night, employees with multiple active non- Student Help jobs whose flag has been re- assigned will appear on the WED.
Example	The employee from example #1 will appear on the WED for a Benefits Administrator to ensure the flag has been correctly re-assigned.

*Note: An employee appearing on the WED is advisory and does **not** necessarily imply that the Benefits Administrator will need to manually change the flag assignment.

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Benefit Primary Flag UPCOMING CHANGES - WED

Workflow Exception Dashboard

Hello Katie, you have claimed 0 and completed 0 errors.

Module:	→ Priority	- Business U	Init:	Q DeptID:	Q (or) DeptID (like):	Search	Clear
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3 UW HR JOB	CODE WITH INCORRECT	PAY BASIS	High	No Pay Basis Job Code w	vith Incorrect Pay Basis	HR	2
4 UW HR NEW	HIRE HOLD		High	New Hire Hold - Missing J	Job Data	HR	98
5 UW HR REH	RET EMP INCORRECT F	REH ANNUITANT FLG	High	Rehired Retired Employe	e with Incorrect Rehired Annuitant Flag	HR	17
6 UW HR MISS	NG OR INCORRECT DAT	TE OF BIRTH	Medium	Missing or Incorrect Date	of Birth	HR	6
7 UW HR MISS	NG SSN		Medium	Employee has invalid or n	nissing SSN	HR	16
	MAX_UNDERMIN		Medium	Employees with over the r have not been reviewed.	maximum or under the minimum salaries that	HR	1356
9 UW HR MISS	NG ADDRESSES		Low	Missing Addresses		HR	401

Batch Run Date: 01/06/2015

Note: Once a Benefits Administrator has reviewed or escalated an employee, the employee will then "fall off" the WED.

SERVICE CENTER

Benefit Primary Flag TENTATIVE DEPLOYMENT TIMELINE

Early February



Benefit Primary Flag QUESTIONS



Benefits Updates

Dependent - AGE 26 Processes

Age 26

- Service Center sends a report at the beginning of each month.
 - List of dependents who turn 26th in the following month and what insurances they are covered under.
 - Includes mail merge for forms needed
- Service Center runs report for changes around 15th of the month.
 - If any changes are found on this report, Service Center will send these out to the institutions (rarely are there changes).

Age 26

- Institutions receive report and validate information
 - Use report and mail merge to create letter and forms to send out to the employees/dependents.
 - Only continuation forms sent by the institutions would be State Group Health insurance and VSP.
- Epic provides COBRA continuation notices directly to the employee/dependents for EPIC Dental Wisconsin and EPIC Benefits Plus.
 - Service Center will provide the institutions with these letters on a quarterly basis for your employee's benefits files.

Age 26

- Campus administrators responsible for collecting any necessary applications to remove dependents.
 - VSP
 - State Group Health if employee is going from family to single coverage due to last dependent on plan.
- Update HRS by removing dependents from the following plans:
 - VSP
 - EPIC Benefits Plus
 - Epic Dental Wisconsin
 - State Group Health Plan
- Reminder the COBRA continuation forms are sent directly to the vendors by the employee/dependent.

Age 26 Process Review

- The Service Center and Institutions each have different roles to perform on monthly, quarterly, and yearly bases
 - Yearly: Continuation forms and health apps change every year, so tailoring for each campus must be done yearly
 - Quarterly: EPIC continuation forms are sent out once every three months. This info should be proofed against info from the Service Center
 - Monthly: The process of identifying dependents turning 26 is run once per month and requires several steps:
 - Generating letters/forms/applications
 - Terminating dependent enrollment in HRS
 - Updating employee enrollment if necessary

Age 26 Yearly Update

- On Friday, January 9, I e-mailed out updated documentation, letters, forms, and executors for 2015.
- If you didn't get this, please e-mail <u>dcmiller@uwsa.edu</u>

То	Age.26 ERA.term
Сс	
Subject:	2015 Age 26 Process Updates and February Birthdates
	age 26 executor 2015.xlsm (41 KB); Age26 Documentation 2015.docx (57 KB); age26 letter template 2015.docm (40 KB); sph continuation form 2015.docm (4 MB); Sch continu

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Age 26 Yearly Update

- 1. Save the attached files in a new directory
- 2. Read Age26_Documentation_2015.docx

3. <u>READ Age26_Documentation_2015.docx</u>

4. Open up age26_letter_template_2015.docm

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You'll probably have to enable macros and make this a 'Trusted Document' before editing

> UNIVERSITY OF WISCON VICE

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- Space has been provided for a campus letterhead
- Letter also has spots highlighted in yellow that you need to update once per year

GENERIC_CAMPUS_PHONE or emailing GENERIC_CAMPUS_EMAIL.

In order to update your records we ask that you, the employee, submit the fo applications as applicable.

- A State Group Health application will be needed if the adult depender dependent and you are changing to single health coverage.
- <u>A VSP enrollment form</u> if your adult dependent needs to be removed t insurance.
- It is not necessary to submit an application to remove your dependent Benefits + or Dental Wisconsin, since we received notification directly

Please submit these forms to your institutional benefit administrator as soon

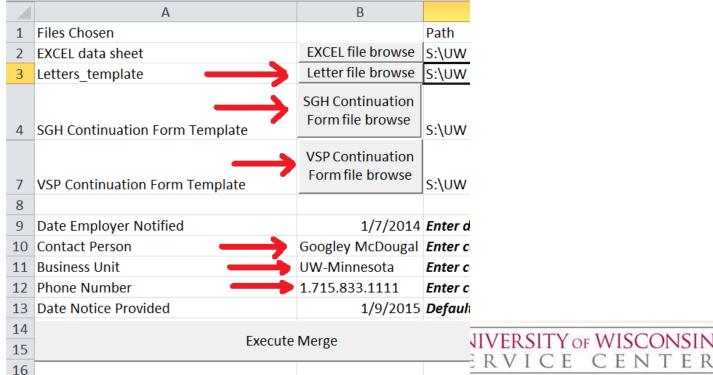
Sincerely,

GENERIC_BENEFITS_ADMINISTRATOR

- After these are updated once, you don't need to touch them for the rest of the year
- The final letters may look different once the mailmerge is completed. You can get a better idea what they will look like by hitting Alt+F9 to toggle how mailmerge codes are displayed

Age 26 Yearly Update

- Open Age_26_executor_2015.docm 5.
- 6. Six fields can be updated yearly, three should be updated every month



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 Every month, the Service Center will e-mail out a workbook of the following month's dependents turning 26. This workbook has a different sheet for each campus.

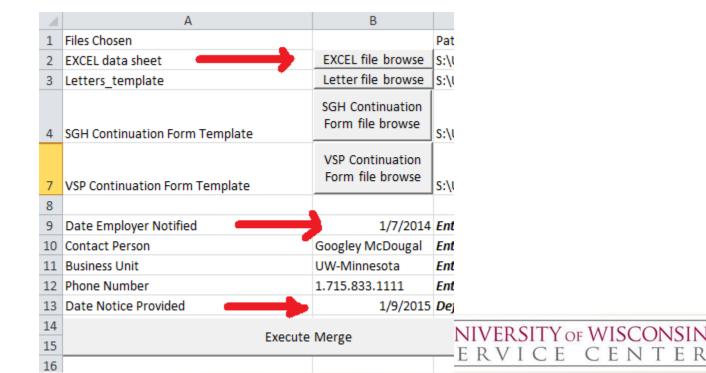


- Save your institution's sheet as a separate file in the same directory as your executor file, letter, and continuation forms
- This is best done by right-clicking on your tab, selecting 'Move selected sheet to book: (new book)'. Click on 'Create a copy' and OK.

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- Then just do a 'Save As...' on the workbook that's created, save it in the same directory as the executor and other files are, and CLOSE this spreadsheet
- Open up age_26_executor_2015.xlsm and update three fields before executing the merge



- Presto chango! Out should pop filled-out continuation forms and letters for your employees. Just print, fold, and mail.
- Health applications have also been generated, but they are BLANK.
- Epic continuation forms are sent out by EPIC itself, and are sent out for your reference to be put in employees' benefits folders once per quarter

Age 26 Monthly Update You should still use the spreadsheet as a tool to help you terminate dependents in HRS

 Remember: letters don't go out for Epic and Dental plans, but you still need to terminate coverage in HRS and/or eventually change coverage codes as appropriate for these plans

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Common Issues

- Make sure macros are enabled to run (this can be toggled on and off in BOTH Excel and Word by going to File -> Options -> Trust Center -> Trust Center Settings...->Macro Settings->'Disable all macros with notification')
- Spreadsheets, the Executor, and the form letters should all be saved in the same directory

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 Close the spreadsheets and mailmerge documents before running the executor

Common Issues

 Sometimes you can fix issues just by deleting your campus' monthly spreadsheet and re-saving it from the monthly communication

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Common Issues

Some dependents do not have SSN's in the system and your continuation forms end up looking like this:

Qua	lified Beneficiary Information (
Employee Spouse/DP Child/Dependent o	f DP

• You can see this information in the spreadsheet, too. Fix it there first.

Institutional Updates & Feedback

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

Important Year-End Payroll Dates – 2014-15

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	/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		

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Calendar Review

Today			January 2015			Ð
Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	31	1 [1M] Pay Period Begin New Year's Day	2 [12M] Pay Date	3
ł	5	6	7	8 [12B] Pay Date	9	10 [1A] Pay Period End
1	12	13	14	15	16	17
[18] Pay Period Begin [1A] 1st Batch Prelim Calc	[1A] 2nd Batch Prelim Calc	[1A] Payroll and Benefit Retro and Payline Load [1A] 3rd Batch Prelim Calc	[1A] FICA Deadline [1A] 4th Batch Prelim Calc	[1A] Final Calc [1A] Confirmation Deadline (Eve)	[1M] 1st Batch Prelim Calc	
18	19	20	21	22	23	24
[1M] 2nd Batch Prelim Calc	[1M] 3rd Batch Prelim Calc Martin Luther King, Jr. Day	[1M] Payroll and Benefit Retro and Payline Load [1M] 4th Batch Prelim Calc	[1M] FICA Deadline [1M] 5th Batch Prelim Calc	[1A] Pay Date [1M] Final Calc [1M] Confirmation Deadline (Eve)		[1B] Pay Period End
25	26	27	28	29	30	31
[2A] Pay Period Begin [1B] 1st Batch Prelim Calc	[1B] 2nd Batch Prelim Calc	[1B] 3rd Batch Prelim Calc [1B] Payroll and Benefit Retro and	[1B] FICA Deadline [1B] 4th Batch Prelim Calc	[1B] Final Calc [1B] Confirmation Deadline (Eve)	[1M] Pay Date	[1M] Pay Period End
Prelim Calc		Benefit Retro and Payline Load	Prelim Calc			

Questions?

