
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

- 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 10:00 a.m. 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
- Enter Empl ID and Search
- Select Calendar ID (HPR 201501A)
- View Accumulators Tab – click View All

2015 Absence Management Balances

- Menu**
- ▷ Benefits
 - ▷ Time and Labor
 - ▷ Payroll for North America
 - ▽ Global Payroll & Absence Mgmt
 - ▷ Payee Data
 - ▽ Absence and Payroll Processing
 - ▷ Define Calendars
 - ▷ Prepare Payroll
 - ▷ Off Cycle
 - ▽ Review Absence/Payroll Info
 - Payee Iterative List
 - Results by Calendar Group
 - Results by Calendar
 - Administrator Results
 - Payee Messages
 - Payee Status
 - Processing Statistics
 - Element Resolution Chain
 - ▷ Reports
 - ▷ Absence Conversion Processing
 - UW Paid Hours Inquiry
 - Calculate Absence and Payroll
 - Sabbatical Processing
 - ▷ Time and Labor / GL Costs
 - ▷ Payroll Interface

[New W](#)

Calendar Results **Accumulators** Supporting Elements

EMP ID: Empl Rcd #: 0

Calendar ID: HPR 201501A Pay Group: HPR Perm/Proj Non-Foreign Nat'l

Calendar Information [Find](#) | [View All](#) First 1 of 1 Last

Calendar Group ID: CLS 2015B0101A Description: CLS201501A
 Segment Number: 1 Version: 1 Revision: 1
 Gross Result Value: 0.000000 USD Net Result Value: 0.000000 USD

Accumulators [Personalize](#) | [Find](#) | **View All** | First 1-5 of 58 Last

Period	Element Name	Amount	Description	From	Through
Calendar Period	UWS AC VN PAID HRS	56.000000	Cls Vac Paid Hours	01/01/2015	01/10/2015
Calendar Period	UWS_C_LH_PTD_PENT	8.000000	Legal Holiday Period to Date	01/01/2015	01/10/2015
Calendar Period	UWS_C_SL_PAYEE	3.500000	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
Calendar Period	UWS_C_VN_AVL_BAL	220.500000	Vacation Available	01/01/2015	01/10/2015

Return to Search Previous in List Next in List Notify

[Calendar Results](#) | [Accumulators](#) | [Supporting Elements](#)

2015 Absence Management Balances

Year to Date	Code	Balance	Description	Start Date	End Date
Year to Date	UWS_C_PH_BAL	36.000000	Personal Holiday Balance	01/01/2015	12/31/2015
Year to Date	UWS_C_PH_ENT	36.000000	Personal Hol. Entitlement YTD	01/01/2015	12/31/2015
Year to Date	UWS_C_PH_LOSS	0.000000	Personal Holiday Lost	01/01/2015	12/31/2015
Year to Date	UWS_C_PH_PENT	36.000000	Personal Hol (Class) Payee Ent	01/01/2015	12/31/2015
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
Year to Date	UWS_C_SAB_BAL	1020.000000	Sabbatical Balance	01/01/2015	12/31/2015
Year to Date	UWS_C_SLADJ_BAL	0.000000	Current Period SL Adjustments	01/01/2015	12/31/2015
Year to Date	UWS_C_SLT_BAL	1040.000000	Cls Sick Lv Threshold Balance	01/01/2015	12/31/2015
Year to Date	UWS_C_SL_BAL	1850.100000	Sick Leave Balance (class)	01/01/2015	12/31/2015
Year to Date	UWS_C_SL_ENT	3.500000	Cls Sick Leave Entitlement	01/01/2015	12/31/2015
Year to Date	UWS_C_SL_ERN	1846.600000	Sick Leave Bal (avail to use)	01/01/2015	12/31/2015
Year to Date	UWS_C_SL_YTD_BAL	3.500000	Sick Leave YTD Bal (earn-used)	01/01/2015	12/31/2015
Year to Date	UWS_C_VC_BAL	4.500000	Vacation Carryover Balance	01/01/2015	12/31/2015
Year to Date	UWS_C_VC_TAKE	8.000000	Vacation Carryover Takes YTD	01/01/2015	12/31/2015
Year to Date	UWS_C_VNA_BAL	216.000000	Vacation Allocation Balance	01/01/2015	12/31/2015
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 non-payment 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.

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

Rvw Charge Smry by Bill Period
 Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

EmpID: begins with

Benefit Record Number: =

Billing Period: begins with 1501

Name: begins with

Last Name: begins with

Business Unit: begins with UWML

Department SetID: begins with

Department: begins with

Organizational Relationship: =

Case Sensitive

Search Results

Line ID	Benefit Record Number	Name	Last Name	Business Unit	Department	Organizational Relationship	Primary Emp	Rcvr	Billing Period
00083872	0	MICHAEL CASALI	CASALI	UWML	8881000	Emp	0	0	1501
00108348	0	MOLLY ABRAHAM	ABRAHAM	UWML	8924010	Emp	0	0	1501
00178788	0	VICKI BOTT	BOTT	UWML	8483300	Emp	0	0	1501
00380754	0	KRISTINA FOSTER	FOSTER	UWML	8172000	Emp	0	0	1501
00539323	0	NICKOLE ABELLO	ABELLO	UWML	8498000	Emp	0	0	1501
00714815	0	DAVID HOWARD	HOWARD	UWML	8927000	Emp	0	0	1501

Benefits Billing On-Demand Delinquency Report

HRS > Benefits > Benefits Billing > Reports > Delinquent Accounts

Report ID: 88881
 As of Date: 01/12/2015
 Business Unit: UMNL

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 Run Date: 01/12/2015
 Run Time: 08:49:42

Billing Season	Billing Period	Ben Plan	Description	Benefit Plan	Coverage Code	Charge Amount	Amount Paid	Date Overdue	Days Overdue	Delinquency Amount		
***** EMERALD COLLEGE Last Payment Date: 10/01/2014 Last Payment Amount: 00.00												
Manual	1501	001	10	Health	AMFIDE	AutismBlue Preferred Southeast	41	1,016.40	0.00	01/11/2015	1	1,016.40
Totals for 30 days and less: 1 Charges												
Manual	1412	001	10	Health	AMFIDE	AutismBlue Preferred Southeast	41	1,016.40	0.00	12/11/2014	30	1,016.40
Totals for 31 - 60 days due: 1 Charges												
Manual	1408	002	10	Health	AMFIDE	Autism Blue Southeast	15	219.00	0.00	08/11/2014	154	219.00
Manual	1408	002	10	Dental W	DKFPPO	Preferred Provider Plan (PPO)	1	18.30	0.00	08/11/2014	154	18.30
Manual	1409	002	10	Dental W	DKFPPO	Preferred Provider Plan (PPO)	1	28.30	0.00	07/11/2014	185	28.30
Manual	1409	001	10	Health	AMFIDE	Autism Blue Southeast	15	841.00	390.91	07/11/2014	186	450.09
Manual	1409	001	10	Dental W	DKFPPO	Preferred Provider Plan (PPO)	17	13.30	0.00	07/11/2014	185	13.30
Manual	1409	002	10	Health	AMFIDE	Autism Blue Southeast	15	219.00	0.00	07/11/2014	185	219.00
Manual	1352	001	10	Health	AMFIDE	Autism Blue Southeast	15	485.18	188.08	07/11/2014	185	297.10
Totals for over 90 days due: 7 Charges												
***** ELIZABETH HARRY-HESSELER Last Payment Date: Last Payment Amount: 00.00												
Manual	1309	001	10	Health	WEAG	WEA Trust East PPO	1	42.00	0.00	08/11/2013	499	42.00
Manual	1298	001	10	Health	WEAG	WEA Trust East PPO	1	42.00	0.00	08/11/2013	519	42.00
Manual	1297	001	10	Health	WEAG	WEA Trust East PPO	1	42.00	0.00	07/11/2013	550	42.00
Manual	1306	001	10	Health	WEAG	WEA Trust East PPO	1	42.00	0.00	08/11/2013	580	42.00
Totals for over 90 days due: 4 Charges												
***** MARGA JENKINS Last Payment Date: 03/14/2012 Last Payment Amount: 048.00												
Manual	1204	001	10	Dental W	UMSCL	Delnet Plan	1	17.86	3.40	08/11/2012	1096	14.46
Totals for over 90 days due: 1 Charges												
***** LINDA CHRISTMACH Last Payment Date: 09/13/2012 Last Payment Amount: 342.18												
Manual	1211	004	02	Benefitar	EPIC	Benefitar without Victim	1	18.99	0.00	11/11/2012	762	18.99

Report ID: 88881
 As of Date: 01/12/2015
 Business Unit: UMNL

Page No. 2
 Run Date: 01/12/2015
 Run Time: 08:49:42

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

Benefit Primary Flag

AGENDA

- 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

1

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

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.

Benefit Primary Flag UPCOMING CHANGES - WED

Workflow Exception Dashboard

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

Module: Priority: Business Unit: DeptID: (or) DeptID (like):

View All First 1-9 of 9 Last

Error ID	Priority	Error Desc	Module	Total Errors
UW_BN_PRIMARY_FLAG_ASSIGNED_CAMPUS	High	Benefit Primary Flag has been assigned, please review and correct if necessary.	Benefits	21
UW_BN_PRIMARY_FLAG_ASSIGNED_CAMPUS	High	Employee may require multiple benefit records. Please review and correct if necessary.	Benefits	2
UW_HR_JOB_CODE_WITH_INCORRECT_PAY_BASIS	High	No Pay Basis Job Code with Incorrect Pay Basis	HR	2
UW_HR_NEW_HIRE_HOLD	High	New Hire Hold - Missing Job Data	HR	98
UW_HR_REH_RET_EMP_INCORRECT_REH_ANNUITANT_FLG	High	Rehired Retired Employee with Incorrect Rehired Annuitant Flag	HR	17
UW_HR_MISSING_OR_INCORRECT_DATE_OF_BIRTH	Medium	Missing or Incorrect Date of Birth	HR	6
UW_HR_MISSING_SSN	Medium	Employee has invalid or missing SSN	HR	16
UW_HR_OVERMAX_UNDERMIN	Medium	Employees with over the maximum or under the minimum salaries that have not been reviewed.	HR	1356
UW_HR_MISSING_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.

Benefit Primary Flag

TENTATIVE DEPLOYMENT TIMELINE

Early February



Deployment



BN WED
Training

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

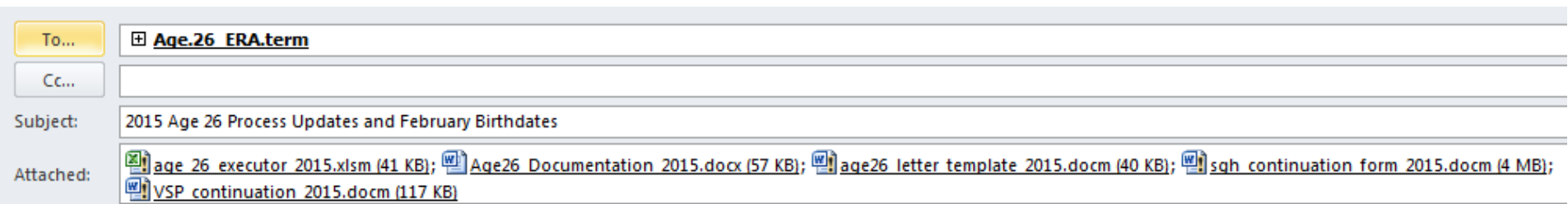
- Campus administrators responsible for collecting any necessary applications to remove dependents.
 - VSP
 - State Group Health if employee is going from family to single coverage due to last dependent on plan.
- Update HRS by removing dependents from the following plans:
 - VSP
 - EPIC Benefits Plus
 - 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

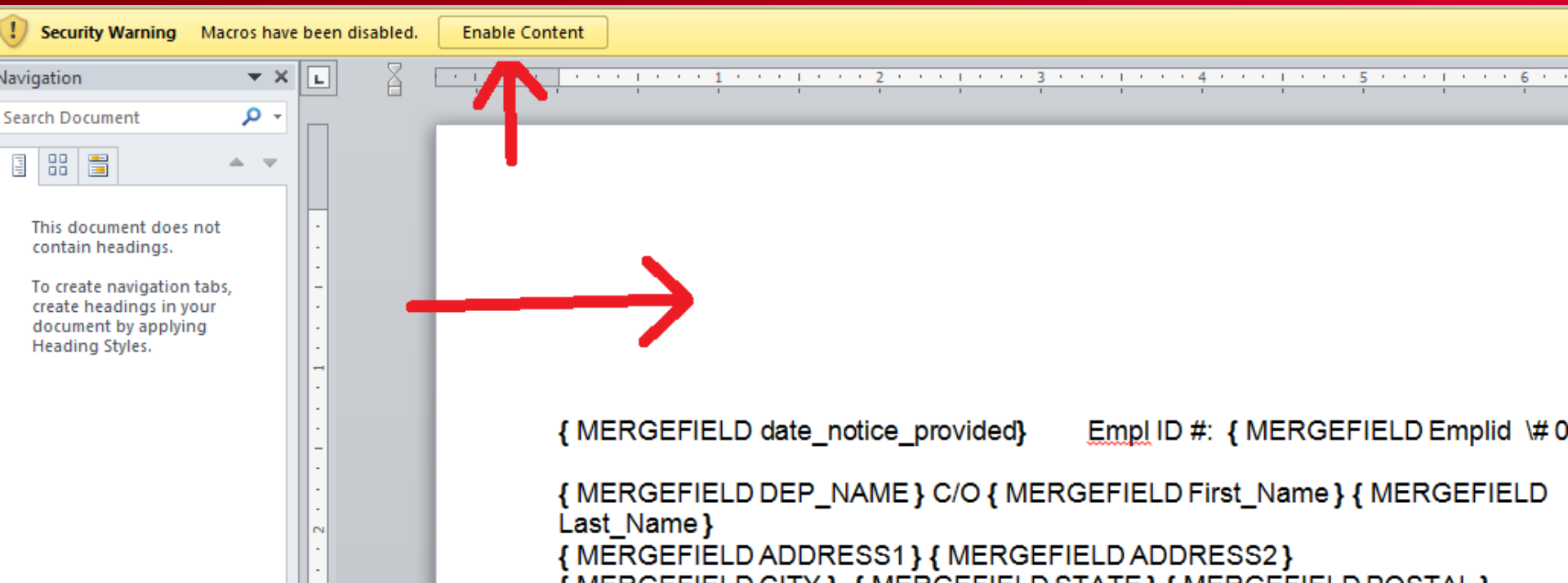
Age 26 Yearly Update

- 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 dcmiller@uwsa.edu



Age 26 Yearly Update

1. Save the attached files in a new directory
2. Read Age26_Documentation_2015.docx
3. **READ Age26_Documentation_2015.docx**
4. Open up age26_letter_template_2015.docm



- You'll probably have to enable macros and make this a 'Trusted Document' before editing
- Space has been provided for a campus letterhead
- Letter also has spots highlighted in yellow that you need to update once per year

at a different address, please let us know by calling us at **GENERIC_CAMPUS_PHONE** or emailing **GENERIC_CAMPUS_EMAIL**.

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

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

Please submit these forms to your institutional benefit administrator as soon as possible.

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

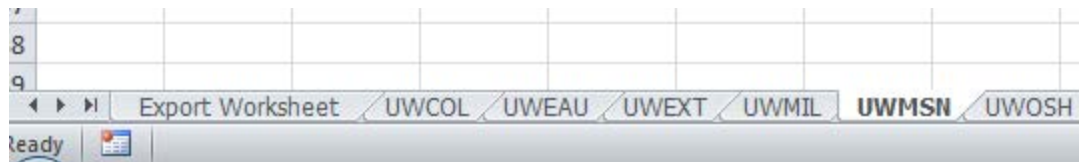
Age 26 Yearly Update

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

	A	B	
1	Files Chosen		Path
2	EXCEL data sheet	EXCEL file browse	S:\UW
3	Letters_template	Letter file browse	S:\UW
4	SGH Continuation Form Template	SGH Continuation Form file browse	S:\UW
7	VSP Continuation Form Template	VSP Continuation Form file browse	S:\UW
8			
9	Date Employer Notified	1/7/2014	Enter d
10	Contact Person	Googley McDougal	Enter c
11	Business Unit	UW-Minnesota	Enter c
12	Phone Number	1.715.833.1111	Enter c
13	Date Notice Provided	1/9/2015	Default
14	Execute Merge		
15			
16			

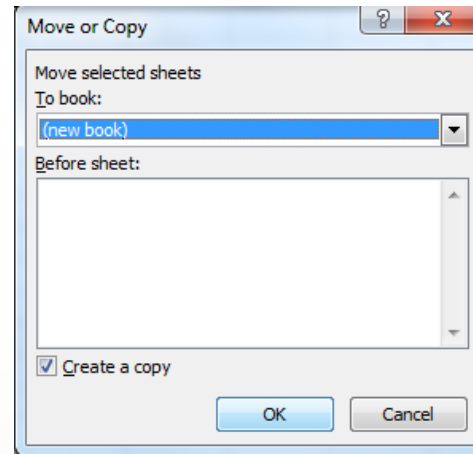
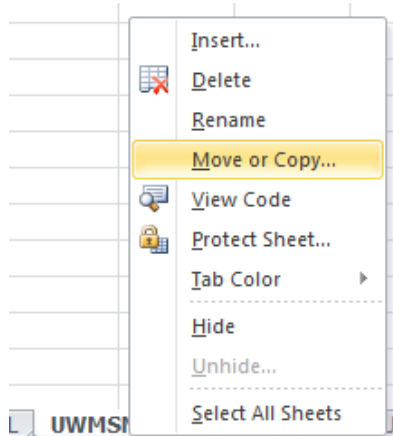
Age 26 Monthly Update

- 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.



Age 26 Monthly Update

- 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.



Age 26 Monthly Update

- 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

	A	B	
1	Files Chosen		Pat
2	EXCEL data sheet	EXCEL file browse	S:\I
3	Letters_template	Letter file browse	S:\I
4	SGH Continuation Form Template	SGH Continuation Form file browse	S:\I
7	VSP Continuation Form Template	VSP Continuation Form file browse	S:\I
8			
9	Date Employer Notified	1/7/2014	Ent
10	Contact Person	Googley McDougal	Ent
11	Business Unit	UW-Minnesota	Ent
12	Phone Number	1.715.833.1111	Ent
13	Date Notice Provided	1/9/2015	Dej
14	Execute Merge		
15			
16			

Age 26 Monthly Update

- 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

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
- 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

Common Issues

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

Qualified Beneficiary Information	
<input type="checkbox"/> Employee	SSN XXX-XX-
<input type="checkbox"/> Spouse/DP	_____
<input checked="" type="checkbox"/> Child/Dependent of DP	_____

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

Institutional Updates & Feedback

- 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	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

Calendar Review

← Today →

1A 1B 1M

January 2015

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
4	5	6	7	8 [12B] Pay Date	9	10 [1A] Pay Period End
11 [1B] Pay Period Begin [1A] 1st Batch Prelim Calc	12 [1A] 2nd Batch Prelim Calc	13 [1A] Payroll and Benefit Retro and Payline Load [1A] 3rd Batch Prelim Calc	14 [1A] FICA Deadline [1A] 4th Batch Prelim Calc	15 [1A] Final Calc [1A] Confirmation Deadline (Eve)	16 [1M] 1st Batch Prelim Calc	17
18 [1M] 2nd Batch Prelim Calc	19 [1M] 3rd Batch Prelim Calc Martin Luther King, Jr. Day	20 [1M] Payroll and Benefit Retro and Payline Load [1M] 4th Batch Prelim Calc	21 [1M] FICA Deadline [1M] 5th Batch Prelim Calc	22 [1A] Pay Date [1M] Final Calc [1M] Confirmation Deadline (Eve)	23	24 [1B] Pay Period End
25 [2A] Pay Period Begin [1B] 1st Batch Prelim Calc	26 [1B] 2nd Batch Prelim Calc	27 [1B] 3rd Batch Prelim Calc [1B] Payroll and Benefit Retro and Payline Load	28 [1B] FICA Deadline [1B] 4th Batch Prelim Calc	29 [1B] Final Calc [1B] Confirmation Deadline (Eve)	30 [1M] Pay Date	31 [1M] Pay Period End

Questions?

