
UNIVERSITY OF WISCONSIN
SERVICE CENTER

Affinity Group 3

February 17, 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
- Payroll Update
- Prepaid Summer Deductions for Unclassified Nine-Month Appointees
- OIM Training
- Student Hire: Template and/or Non-Template Users
- Declaration for Non-Wisconsin-Residents
- Navigation in HRS for Benefit Billing Screens
- Institution Feedback & Updates
- Calendar Year End Schedule
- Calendar Review
- Questions/Comments

Payroll Update

- Wellness Reimbursements – Dean Health Plan & Health Partners
 - From November & December 2014
 - Loaded on the 2M & 2B Payrolls
 - Payroll Team will forward a list of employees to Payroll Coordinators

Payroll Update

- 2014 Taxable Fringes Loaded to the Calendar Year End Payroll
 - Social Security & Medicare deductions covered by employer
 - Employees were notified
 - Adjustments on 2M & 2B payrolls
 - Payroll Team will send out a list of employees to Payroll Coordinators

Prepaid Summer Deductions for Unclassified Nine-Month Appointees

- Upcoming Communication & Training:
 - February 26 – Workshop on HR/Finance Processes
 - March 3 – Hot Topics
 - March 5 – Benefits Processes
- More Details Available Soon!

OIM Training

- March 9
- Blackboard Collaborate

Student Hire: Template and/or Non-Template Users

- Which Institutions:
 - Use the template for new student hires?
 - Use Add a Person/Hire a Person into a Job for student hires?
 - Or both (and why)?



Declaration for Non-Wisconsin-Residents

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.

Objectives

Compliance with the Wisconsin Department of Revenue

Communication of the new business process for those who live/work outside WI:

- Beginning of every year
- End of the year for CYE reminder and deadline.

Report all time spent “working” inside the state of WI as taxable wages for each employee.

FACTS

Employee population affected is defined on top section of form below.
The employee will complete the form.

University of Wisconsin

Year: 20__

Declaration of Wages for Non-Wisconsin-Residents

Please check all of the following boxes that apply:

- You reside outside of Wisconsin
- You are not a Wisconsin resident
- You are not a resident of a state with which WI has a reciprocal agreement (IN, IL, MI, KY)
- Your work is performed primarily outside of Wisconsin
- You had earned wages while present in Wisconsin that are **over \$1500** in the calendar year.

If all of the boxes above are checked, you are required to complete this form and submit it to the UW Service Center/Payroll.

FACTS (cont.)

- Form consists of employee information:
- Personal record of ALL of their time spent “working” in Wisconsin over the calendar year

Last Name:	First Name:	Middle Initial:	Empl ID (if known):
Date of Birth:	Home Phone Number:	Email Address:	
Home Street Address:		City/State/Zip:	
USA State of Residence:		UW Campus:	

Indicate the amount of allocated time worked in the **State of Wisconsin**:

Description of Work Activity:	Beginning Date:	Ending Date:	*Number of Days:	**Gross Pay Daily Rate:	Line Total (No. days X Gross Pay):
(Example) Employee Training	8/19/2015	8/22/2015	4	\$205.00	\$820.00

*[This includes weekends] **[Gross Pay Daily Rate calculation: Monthly Salary/Actual number of days in the month]

FACTS (cont.)

- Declaration by employee (signed)
- Approval by HR/PY Coordinator (signed)

I declare that while working in Wisconsin, I am a legal resident of the State of _____. The UW will use the data from my filed W-4 for determining taxable wages and withholding outside of this declaration. Under the 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.

Signature of Employee: _____

Date: _____

By approving this form, I certify I am authorized to approve these forms on behalf of the campus/division. I have personally reviewed this form for accuracy and validated the times this employee was working in the State of Wisconsin.

Signature of HR/PY Coordinator: _____

Date: _____

BUSINESS FLOW

Customers

- Employees are identified by their supervisors. Employees complete form.

Affinity Groups

- Provide support for questions
- Enter ticket for completed forms and forward to UWSC Payroll.

Payroll

- Review and enter forms before CYE.
- Provide confirmation through ticket closure.

Questions?



NAVIGATION IN HRS FOR BENEFIT BILLING SCREENS

A decorative graphic consisting of several parallel white lines of varying thicknesses, slanted diagonally from the bottom-left towards the top-right, located in the lower right quadrant of the slide.

Tip - Use My Favorites to quickly move to my commonly used screens for benefit billing. I placed BB – in front of all favorites that relate to benefit billing for easy retrieval.

Menu

Search:

My Favorites

- ABBRs Update
- Arrears - Adjustment
- Arrears - Create
- Arrears - Review
- **BB Adjust Charges**
- **BB Adjust Payments**
- **BB Allocate Payments**
- **BB Arrears Review**
- **BB Arrears Update**
- **BB Enroll In**
- **BB Enter Manual Charges**
- **BB Print Billing Statement**
- **BB Reprint Statements**
- **BB Review Adjustment Summary**
- **BB Review Charge Detail**
- **BB Review Empl Bal**
- **BB Review Payment/Deta**
- **BB Review Summary by F Date**
- Benefits Review
- Current Benefits ReviewSummary
- Dependent/Beneficiary Update
- Employee Info
- Flags - Maintain
- Flags - Rebuild Primary J
- General Comments
- Health Benefits
- Job Data
- Leave Balances

Main Menu >

Benefits
Select benefit plans, track company cars & FMLA, calculate leave accrual & annuity, maintain primary job, NDT, FSA details, auto enrollment, COBRA, and merchants.

Employee/Dependent Information
Identifies employee profile information relating to benefits eligibility, and maintains dependent/beneficiary data including enrollment summaries and final check rights.

- Review HR/Job/Payroll Data
- Benefits Personal Data
- Update Dependent/Beneficiary
- 8 More...

Enroll In Benefits
Assigns employees to benefit program and enrolls in benefit plans (health, life, disability, savings, etc.).

- Assign to Benefit Program
- Health Benefits
- Life and AD/D Benefits
- 7 More...

Reports
Provides reports with participation and contribution details, regulatory compliance and audit data.

- State Group Life ABBR Report
- Benefit Contributions Report
- Audits
- 6 More...

Administer COBRA Benefits
Allows for COBRA enrollment, review of processing results, creation of participant enrollment information, and tracking and terminating COBRA coverage

- Manage Automated Participation
- Review Processing Results

FMLA/WFMLA Request
FMLA/WFMLA Request

Manage Automated Enrollment
Manages and processes employee events related to automated benefits administration.

- Events
- Participant Enrollment
- Review Processing Results
- Investigate Exceptions

Interface with Providers
Manages the transmittal of benefit enrollment and premium information to providers or other third parties.

- Refresh Benefit Snapshot
- Create Health File
- Create Life/ADD File
- 16 More...

Benefits Billing
Contains pages for managing billing for benefits costs, including printing statements, calculation and review of charges, billing adjustments, and application and posting of payments.

- Manage Acct Status and Balance
- Calculate and Review Charges
- Review Processing Results
- 5 More...

Benefits > Benefits Billing > Manage Acct Status and Balances.....

- Enroll in Benefits
- Review Employee Balances

The screenshot displays the Oracle HR Self-Service interface. The top navigation bar includes 'Home', 'Worklist', 'Add to Favorites', and 'Sign out'. The left sidebar contains a 'Menu' section with a search field and a list of navigation options, including 'My Favorites', 'CLEAN_Address', 'Inbound File Upload', 'Self Service', 'Manager Self Service', 'Workforce Administration', 'Benefits', 'Employee/Dependent Information', 'Review Employee Benefit', 'Enroll In Benefits', 'Manage Automated Enrollment', 'Maintain Primary Jobs', 'Reports', 'Interface with Providers', 'Monitor Savings Plan Extensions', 'Administer COBRA Benefit', 'Benefits Billing', 'Manage Acct Status and Balance', 'Calculate and Review Charges', 'Review Processing Results', 'Create Statements', 'Apply Payments', 'Make Adjustments', 'Billing Interface', and 'Reports'. The main content area is titled 'Main Menu > Benefits > Benefits Billing' and contains a grid of menu items. The 'Manage Acct Status and Balance' item is highlighted in yellow and includes sub-items 'Enroll in Billing', 'Request Hold/Alternate Address', and 'Review Employee Balances'. Other items include 'Calculate and Review Charges', 'Review Processing Results', 'Create Statements', 'Apply Payments', 'Make Adjustments', 'Billing Interface', and 'Reports'. Each item has a brief description and a list of sub-links.

Benefits Billing
Contains pages for managing billing for benefits costs, including printing statements, calculation and review of charges, billing adjustments, and application and posting of payments.

- Manage Acct Status and Balance**
Displays account balances and identifies billing errors and requests holds or alternate addresses.
 - [Enroll in Billing](#)
 - [Request Hold/Alternate Address](#)
 - [Review Employee Balances](#)
- Calculate and Review Charges**
Initiates the automated calculation of billing charges, allows for manual charge entry and displays of charge summaries.
 - [Calculate Periodic Charges](#)
 - [Enter Manual Charges](#)
 - [Review Charge Details](#)
 - [3 More...](#)
- Review Processing Results**
Displays error messages and creates calculation error reports.
 - [Review Processing Messages](#)
 - [Calculation Error Report](#)
- Create Statements**
Prints (or reprints) billing statements.
 - [Print Billing Statement](#)
 - [Reprint Statements](#)
- Apply Payments**
Allocates payments to charges and displays payment and posting date summaries.
 - [Allocate Payments to Charges](#)
 - [Review Payment/Details](#)
 - [Review Summary by Post Date](#)
- Make Adjustments**
Adjusts billing charges and payments.
 - [Adjust Charges](#)
 - [Adjust Payments](#)
 - [Review Adjustment Summary](#)
- Billing Interface**
Provides billing file to Accounts Receivable (AR) and posting of payments from a file.
 - [Provide Billing to AR](#)
- Reports**
Creates reports displaying details of billing and/or payment activities.
 - [Billing Audit](#)
 - [Accounts Receivable](#)
 - [Delinquent Accounts](#)
 - [2 More...](#)

Benefits > Benefits Billing > Manage Acct Status and Balances > Enroll in Benefits

Best practices:

- Effective date always the 1st of the month.
- If the employee may be out more than 3 months on a LOA w/o pay - go ahead and enter the Total Rate for the 4th month for SGH and ICI when you set them up. Follow policy for C-basis Academic Year Employees.
- If the employee is termed and rehired the BB record will be inactivated. You will have to activate again.
- If the employee's LOA is ended and restarted in Job Data the BB record will be inactivated. You will have to activate again.

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My Favorites

- ABBRs Update
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- BB Adjust Charges
- BB Adjust Payments
- BB Allocate Payments
- BB Arrears Review
- BB Arrears Update
- **BB Enroll In**
- BB Enter Manual Charges
- BB Print Billing Statement
- BB Reprint Statements
- BB Review Adjustment Summary
- BB Review Charge Detail
- BB Review Empl Bal
- BB Review Payment/Deta
- BB Review Summary by F
- Date
- Benefits Review
- Current Benefits
- Review Summary
- Dependent/Beneficiary Update
- Employee Info
- Flags - Maintain
- Flags - Rebuild Primary J
- General Comments
- Health Benefits
- Job Data
- Leave Balances
- Leave Balances by Calen
- On-Demand Event
- Maintenance
- Payable Time Report
- Pavline Adjustment Page Create
- Pavlines Print
- Pavlines Review
- Pavlines Update Payshee
- Populate Eligibility Confir
- Process Monitor
- Retro Ded Calc
- Updates/Review
- Retro Delete Retro Ded Request
- Review BAS Activity
- Review Paycheck
- Search by SS# / National
- UW Multiple Jobs Summa
- UW Pavline Adjustment Page
- WRS Accumulator
- Add to Favorites
- Edit Favorites
- CLEAN_Address
- Inbound File Upload
- Self Service

Benefits Billing Enrollment

Employee [] Benefit Rcd Nbr: 0

Billing Enrollment Details Find | View All First 1 of 11 Last

*Plan Type: 10 State Group Health

COBRA Details Find | View All First 1 of 1 Last

COBRA Event ID: 0

Deduction Calculation per Billing Period Find | View 1 First 1-9 of 9 Last

*Effective Date: 12/01/2014 Event Identification:

*Billing Status: Inactive *Billing Reason: Manual

Percent Calculation 0 % of: Total Rate

plus/or

Flat Amount Employee Share []

Employer Amt Employer Share []

*Effective Date: 11/01/2014 Event Identification:

*Billing Status: Active *Billing Reason: Manual

Percent Calculation 100 % of: Employee Rate

plus/or

Flat Amount Employee Share []

Employer Amt Employer Share []

*Effective Date: 09/01/2014 Event Identification:

*Billing Status: Active *Billing Reason: Manual

Percent Calculation 100 % of: Employee Rate

plus/or

Flat Amount Employee Share []

Employer Amt Employer Share []

*Effective Date: 04/01/2013 Event Identification:

*Billing Status: Inactive *Billing Reason: Manual

Main Menu > Payroll for North America > Periodic Payroll Events USA > Balance Reviews > Arrears

It is a best practice when enrolling an employee into benefits billing that you verify the charges did not go into arrears. If the balance is in arrears, submit a WiscIT to move the balance to -0-.

Menu

Search:

My Favorites

- ABBRs Update
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- Arrears - Create
- **Arrears - Review**
- BB Adjust Charges
- BB Adjust Payments
- BB Allocate Payments
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- BB Reprint Statements
- BB Review Adjustment Summary
- BB Review Charge Detail
- BB Review Empl Bal
- BB Review Payment/Detail
- BB Review Summary by F Date
- Benefits Review
- Current Benefits ReviewSummary
- Dependent/Beneficiary Update
- Employee Info
- Flags - Maintain

Arrears Balances | **Arrears Balance Adjustments**

Person ID: [REDACTED]

Company: UWS University of Wisconsin System

Arrears Information [Find](#) | [View All](#) First 1 of 5 Last

Plan Type:	11	Anthem DentalBlue Dental
Benefit Plan:	DBSUP	Supplemental Plan
Benefit Record Number:	0	
Deduction Code:	DBSUP	Supplemental Plan
Deduction Classification:	B	Before-Tax
Arrears Balance:		

[Return to Search](#) [Notify](#)

Benefits > Benefits Billing > Manage Acct Status and Balances > Review Employee Balances

Menu

- My Favorites
- CLEAN_Address
- Inbound File Upload
- Self Service
- Manager Self Service
- Workforce Administration
- Benefits
 - Employee/Dependent Information
 - Review Employee Benefit
 - Enroll In Benefits
 - Manage Automated Enrollment
 - Maintain Primary Jobs
 - Reports
 - Interface with Providers
 - Monitor Savings Plan Extensions
 - Administer COBRA Benefit
 - Benefits Billing
 - Manage Acct Status and Balance
 - Enroll In Billing
 - Request Hold/Alternate Address
 - Review Employee Balances**
 - Calculate and Review Charges
 - Review Processing Results
 - Create Statements
 - Apply Payments
 - Make Adjustments
 - Billing Interface
 - Reports
 - FMLA/WFMLA Request
 - Time and Labor
 - Payroll for North America
 - Global Payroll & Absence Mgmt
 - Payroll Interface
 - Workforce Development
 - Organizational Development
 - Workforce Monitoring
 - Campus Community
 - Student Admissions
 - Records and Enrollment
 - Financial Aid
 - Set Up HRMS
 - Set Up SACR
 - Enterprise Components
 - UW Absence Management Reports
 - UW Benefits Reports
 - UW Financial Reports
 - UW HR Reports
 - UW Payroll Reports
 - Worklist
 - Application Diagnostics

Employee Billing

Person ID:

Emp#	Balance Review	Personalize	Find	View 10	First	1-47 of 47	Last
Billing Period	Plan Type	Total Charge	Total Payment	Net			
1408	2V AD&D	22.00	22.00	0.00			
1409	2V AD&D	22.00	22.00	0.00			
1410	2V AD&D	22.00	22.00	0.00			
1411	2V AD&D	22.00	22.00	0.00			
1408	12 EPIC Benefits+	39.54	39.54	0.00			
1409	12 EPIC Benefits+	39.54	39.54	0.00			
1410	12 EPIC Benefits+	0.00	0.00	0.00			
1411	12 EPIC Benefits+	0.00	0.00	0.00			
1410	10 State Group Health	0.00	0.00	0.00			
1411	10 State Group Health	0.00	0.00	0.00			
1408	2Q Ind & Fam Life - Employee	12.92	12.92	0.00			
1409	2Q Ind & Fam Life - Employee	0.00	0.00	0.00			
1410	2Q Ind & Fam Life - Employee	0.00	0.00	0.00			
1411	2Q Ind & Fam Life - Employee	0.00	0.00	0.00			
1408	2R Ind & Fam Life - Spouse/DP	10.26	10.26	0.00			
1409	2R Ind & Fam Life - Spouse/DP	0.00	0.00	0.00			
1410	2R Ind & Fam Life - Spouse/DP	0.00	0.00	0.00			
1411	2R Ind & Fam Life - Spouse/DP	0.00	0.00	0.00			
1408	3Z Income Continuation Insurance	7.98	7.98	0.00			
1409	3Z Income Continuation Insurance	0.00	0.00	0.00			
1410	3Z Income Continuation Insurance	0.00	0.00	0.00			
1411	3Z Income Continuation Insurance	0.00	0.00	0.00			
1408	2O State Group Life - Additional	71.28	71.28	0.00			
1409	2O State Group Life - Additional	71.28	71.28	0.00			
1410	2O State Group Life - Additional	71.28	71.28	0.00			
1411	2O State Group Life - Additional	71.28	71.28	0.00			
1408	2M State Group Life - Basic	15.84	15.84	0.00			
1409	2M State Group Life - Basic	15.84	15.84	0.00			
1410	2M State Group Life - Basic	15.84	15.84	0.00			
1411	2M State Group Life - Basic	15.84	15.84	0.00			
1408	2P State Group Life - Sp/DP & Dep	5.00	5.00	0.00			
1409	2P State Group Life - Sp/DP & Dep	5.00	5.00	0.00			
1410	2P State Group Life - Sp/DP & Dep	5.00	5.00	0.00			
1411	2P State Group Life - Sp/DP & Dep	5.00	5.00	0.00			
1408	2N State Group Life-Supplemental	15.84	15.84	0.00			
1409	2N State Group Life-Supplemental	15.84	15.84	0.00			
1410	2N State Group Life-Supplemental	15.84	15.84	0.00			
1411	2N State Group Life-Supplemental	15.84	15.84	0.00			

Benefits > Benefits Billing > Manage Acct Status and Balances > Review Employee Balances

The screenshot shows the Oracle HRMS interface. On the left is a navigation menu with the following items: Menu, Search, My Favorites, CLEAN_Address, Inbound File Upload, Self Service, Manager Self Service, Workforce Administration, Benefits, Employee/Dependent Information, Review Employee Benefit, Enroll In Benefits, Manage Automated Enrollment, Maintain Primary Jobs, Reports, Interface with Providers, Monitor Savings Plan Extensions, Administer COBRA Benefit, Benefits Billing, Manage Acct Status and Balance, Enroll in Billing, Request Hold/Alternate Address, Review Employee Balances, Calculate and Review Charges, Review Processing Results, Create Statements, Apply Payments, Make Adjustments, Billing Interface, Reports, FMLA/WFMLA Request, Time and Labor, Payroll for North America, Global Payroll & Absence Mgmt, Payroll Interface, Workforce Development, Organizational Development, Workforce Monitoring, Campus Community, Student Admissions, Records and Enrollment, Financial Aid, Set Up HRMS, Set Up SACR, Enterprise Components, UW Absence Management Reports, UW Benefits Reports.

Three red arrows point to the 'Benefits Billing' section, the 'Manage Acct Status and Balance' sub-section, and the 'Review Employee Balances' menu item.

The main table displays the following data:

Employee ID	Plan Name	Charge	Payment	Owe	
1412	2N State Group Life-Supplemental	1.16	1.16	0.00	
1412	2S Ind & Fam Life - Child(ren)	0.70	0.70	0.00	
1501	13 Dental Wisconsin	0.00	0.00	0.00	
1501	2R Ind & Fam Life - Spouse/DP	4.00	4.00	0.00	
1502	2M State Group Life - Basic	1.16	1.16	0.00	
1502	2R Ind & Fam Life - Spouse/DP	4.00	4.00	0.00	
1105	11 Anthem DentalBlue Dental	49.80	49.80	0.00	
1106	10 State Group Health	78.00	78.00	0.00	
1106	20 State Group Life - Additional	5.22	5.22	0.00	
1106	2R Ind & Fam Life - Spouse/DP	2.80	2.80	0.00	
1107	11 Anthem DentalBlue Dental	49.80	49.80	0.00	
1108	2M State Group Life - Basic	0.00	0.00	0.00	
1108	2R Ind & Fam Life - Spouse/DP	0.00	0.00	0.00	
1108	3Z Income Continuation Insurance	0.00	0.00	0.00	
1207	11 Anthem DentalBlue Dental	54.28	54.28	0.00	
1208	11 Anthem DentalBlue Dental	54.28	54.28	0.00	
1212	20 State Group Life - Additional	5.22	5.22	0.00	
1301	13 Dental Wisconsin	71.59	71.59	0.00	
1301	2N State Group Life-Supplemental	1.16	1.16	0.00	
1302	13 Dental Wisconsin	71.59	71.59	0.00	
1302	2Q Ind & Fam Life - Employee	4.48	4.48	0.00	
1303	10 State Group Health	211.00	211.00	0.00	
1303	20 State Group Life - Additional	5.22	5.22	0.00	
1303	2Q Ind & Fam Life - Employee	4.48	4.48	0.00	
1409	2N State Group Life-Supplemental	1.16	1.16	0.00	
1409	2R Ind & Fam Life - Spouse/DP	4.00	4.00	0.00	
1409	3Z Income Continuation Insurance	23.61	23.61	0.00	
1411	2P State Group Life - Sp/DP & Dep	5.00	5.00	0.00	
1411	2S Ind & Fam Life - Child(ren)	0.70	0.70	0.00	
1502	2P State Group Life - Sp/DP & Dep	5.00	5.00	0.00	
1105	2N State Group Life-Supplemental	1.16	1.16	0.00	
1105	2Q Ind & Fam Life - Employee	3.00	3.00	0.00	
1106	11 Anthem DentalBlue Dental	49.80	49.80	0.00	
1106	2Q Ind & Fam Life - Employee	3.00	3.00	0.00	
1208	2R Ind & Fam Life - Spouse/DP	3.20	3.20	0.00	
1301	2R Ind & Fam Life - Spouse/DP	4.00	4.00	0.00	
1303	2M State Group Life - Basic	1.92	1.92	0.00	
1303	2R Ind & Fam Life - Spouse/DP	4.00	4.00	0.00	
Open Credit:	43.44	Grand Total:	2962.61	2962.61	0.00

Charge Payment
Owe

Benefits > Benefits Billing > Calculate and Review Charges...

- Enter Manual Charges (not covered in today's presentation)
- Review Charge Detail

The screenshot displays the Oracle HR System interface. At the top left is the Oracle logo. Below it is a search bar and a menu tree. The main content area is titled 'Main Menu > Benefits > Benefits Billing' and contains a grid of sub-menus. The 'Calculate and Review Charges' sub-menu is highlighted in yellow, and its sub-items 'Enter Manual Charges' and 'Review Charge Details' are also highlighted. The 'Benefits Billing' sub-menu is also highlighted in blue.

ORACLE

Home | Worklist | Add to F

Menu

Search:

- My Favorites
- CLEAN_Address
- Inbound File Upload
- Self Service
- Manager Self Service
- Workforce Administration
- Benefits**
 - Employee/Dependent Information
 - Review Employee Benefit
 - Enroll In Benefits
 - Manage Automated Enrollment
 - Maintain Primary Jobs
 - Reports
 - Interface with Providers
 - Monitor Savings Plan Extensions
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 - Global Payroll & Absence Mgmt
 - Payroll Interface
 - Workforce Development
 - Organizational Development
 - Workforce Monitoring

Main Menu > Benefits > Benefits Billing

Benefits Billing
Contains pages for managing billing for benefits costs, including printing statements, calculation and review of charges, billing adjustments, and application and posting of payments.

- Manage Acct Status and Balance**
Displays account balances and identifies billing errors and requests holds or alternate addresses.
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Initiates the automated calculation of billing charges, allows for manual charge entry and displays of charge summaries.
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 - 3 More...
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Displays error messages and creates calculation error reports.
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Prints (or reprints) billing statements.
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Adjusts billing charges and payments.
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Provides billing file to Accounts Receivable (AR) and posting of payments from a file.
 - Provide Billing to AR
- Reports**
Creates reports displaying details of billing and/or payment activities.
 - Billing Audit
 - Accounts Receivable
 - Delinquent Accounts
 - 2 More...

Benefits > Benefits Billing > Calculate and Review Charges > Review Charge Detail

Review Charge Details

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

Search Criteria

Empl ID: begins with []

Benefit Record Number: = []

Billing Period: begins with []

Plan Type: = []

Billing Charge ID: = []

Name: begins with []

Last Name: begins with []

Business Unit: begins with []

Department SetID: begins with []

Department: begins with []

Organizational Relationship: = []

Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

Search Results

Business Unit	Department	Organizational Relationship	Primary Empl Rcd#	Billing Period	Plan Type	Billing Charge ID
WMSN	A717035	Emp	0	1502	I&F Child	59742
WMSN	A717035	Emp	0	1502	I&F Sp/DP	59741
WMSN	A717035	Emp	0	1502	I&F EE	59740
WMSN	A717035	Emp	0	1502	SGL Sp&Dep	59739
WMSN	A717035	Emp	0	1502	SGL Basic	59736
WMSN	A717035	Emp	0	1502	SGL Add	59738
WMSN	A717035	Emp	0	1502	SGL Sup	59737
WMSN	A717035	Emp	0	1501	I&F EE	58787
WMSN	A717035	Emp	0	1501	I&F Sp/DP	58788
WMSN	A717035	Emp	0	1501	I&F Child	58789
WMSN	A717035	Emp	0	1501	SGL Sp&Dep	58786
WMSN	A717035	Emp	0	1501	SGL Add	58785
WMSN	A717035	Emp	0	1501	Dental Wl	58782
WMSN	A717035	Emp	0	1501	SGL Sup	58784
WMSN	A717035	Emp	0	1501	SGL Basic	58783
WMSN	A717035	Emp	0	1412	Dental Wl	57218
WMSN	A717035	Emp	0	1412	I&F Sp/DP	57224
WMSN	A717035	Emp	0	1412	Health	57217
WMSN	A717035	Emp	0	1412	I&F EE	57222

Benefits > Benefits Billing > Apply Payments

- Review Payment Detail
- Review Summary By Post Date

We attempt to post payments the same day we receive them - these records should be up to date.

The screenshot displays a web application interface with a sidebar menu on the left and a main content area on the right. The sidebar menu includes options like 'My Favorites', 'CLEAN_Address', 'Inbound File Upload', 'Self Service', 'Manager Self Service', 'Workforce Administration', 'Benefits', 'Employee/Dependent Information', 'Review Employee Benefit', 'Enroll In Benefits', 'Manage Automated Enrollment', 'Maintain Primary Jobs', 'Reports', 'Interface with Providers', 'Monitor Savings Plan Extensions', 'Administer COBRA Benefit', 'Benefits Billing', 'Manage Acct Status and Balance', 'Calculate and Review Charges', 'Review Processing Results', 'Create Statements', 'Apply Payments', 'Make Adjustments', 'Billing Interface', 'Reports', 'FMLA/FMLA Request', 'Time and Labor', and 'Payroll for North America'. The 'Benefits Billing' option is highlighted with a red arrow. The main content area shows a breadcrumb trail 'Main Menu > Benefits > Benefits Billing' and a description: 'Contains pages for managing billing for benefits costs, including printing statements, calculation and review of charges, billing adjustments, and application and posting of payments.' Below this, there are several sections: 'Manage Acct Status and Balance' (with links for 'Enroll in Billing', 'Request Hold/Alternate Address', and 'Review Employee Balances'), 'Create Statements' (with links for 'Print Billing Statement' and 'Reprint Statements'), 'Billing Interface' (with link for 'Provide Billing to AR'), 'Calculate and Review Charges' (with links for 'Calculate Periodic Charges', 'Enter Manual Charges', 'Review Charge Details', and '3 More...'), 'Apply Payments' (with links for 'Allocate Payments to Charges', 'Review Payment/Details', and 'Review Summary by Post Date'), 'Review Processing Results' (with links for 'Review Processing Messages' and 'Calculation Error Report'), and 'Make Adjustments' (with links for 'Adjust Charges', 'Adjust Payments', and 'Review Adjustment Summary'). The 'Apply Payments' and 'Review Summary by Post Date' options are highlighted in yellow. The top right corner of the interface has 'Home' and 'Worklist' links.

Benefits > Benefits Billing > Apply Payments > Review Payment Detail

- Menu
- Search:
- My Favorites
- CLEAN_Address
- Inbound File Upload
- Self Service
- Manager Self Service
- Workforce Administration
- Benefits
- Employee/Dependent Information
- Review Employee Benefit
- Enroll In Benefits
- Manage Automated Enrollment
- Maintain Primary Jobs
- Reports
- Interface with Providers
- Monitor Savings Plan Extensions
- Administer COBRA Benefit
- Benefits Billing
- Manage Acct Status and Balance
- Calculate and Review Charges
- Review Processing Results
- Create Statements
- Apply Payments
- Allocate Payments to Charges
- Review Payment/Details
- Review Summary by Post Date
- Make Adjustments
- Billing Interface
- Reports

Benefit Billing Payment Review

[Redacted]

Person ID: [Redacted]

Posting Date: 02/11/2015 Posting Sequence: 1 Form of Payment: Check

Entry Date: 02/11/2015 Print Period: Payment ID: 6195

Payment: 65.16 Payment Adjustments: 0.00 Actual Payment: 65.16

Payment Review								
Date Due	Billing Period	Plan Type	COBRA Event ID	Benefit Plan	Covrg Cd	Total Charge	Amount Due	Total Amount Paid
12/10/2014	1412	Dental WI		Select	21	71.59	0.00	21.72

Applied to Open Credit: 43.44

Total Allocation: 0.00

[Return to Search](#) [Previous in List](#) [Next in List](#) [Notify](#)

Benefits > Benefits Billing > Apply Payments > Review Summary By Post Date

Menu

Search:

- ▷ My Favorites
- ▷ CLEAN_Address
- ▷ Inbound File Upload
- ▷ Self Service
- ▷ Manager Self Service
- ▷ Workforce Administration
- ▷ Benefits
 - ▷ Employee/Dependent Information
 - ▷ Review Employee Benefit
 - ▷ Enroll In Benefits
 - ▷ Manage Automated Enrollment
 - ▷ Maintain Primary Jobs
 - ▷ Reports
 - ▷ Interface with Providers
 - ▷ Monitor Savings Plan Extensions
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 - ▷ Manage Acct Status and Balance
 - ▷ Calculate and Review Charges
 - ▷ Review Processing Results
 - ▷ Create Statements
 - ▷ Apply Payments
 - Allocate Payments to Charges
 - Review Payment/Details
 - Review Summary by Post Date
 - ▷ Make Adjustments

Smmry by Pst Date

Person ID:

Payment Summary								
Posting Date	Post Seg	Form of Payment	Actual Pmt	Pmt Adjust	Payment	Entry Date	Print Per	Payment ID
02/11/2015	1	Check	65.16		65.16	02/11/2015		6195
01/28/2015	1	Check	115.03		115.03	01/28/2015	1502	6069
12/11/2014	1	Check	288.70		288.70	12/11/2014	1502	5848
11/25/2014	1	Check	23.61		23.61	11/25/2014	1502	5762
11/06/2014	1	Check	300.51	-23.61	324.12	11/06/2014	1502	5679
10/08/2014	1	Check	324.11		324.11	10/08/2014	1502	5584
09/16/2014	1	Check	23.61		23.61	09/16/2014	1502	5475
03/14/2013	1	Check	327.58		327.58	03/14/2013	1502	3077
02/12/2013	1	Check	328.48		328.48	02/12/2013	1502	2950
01/09/2013	1	Check	340.26		340.26	01/09/2013	1502	2813

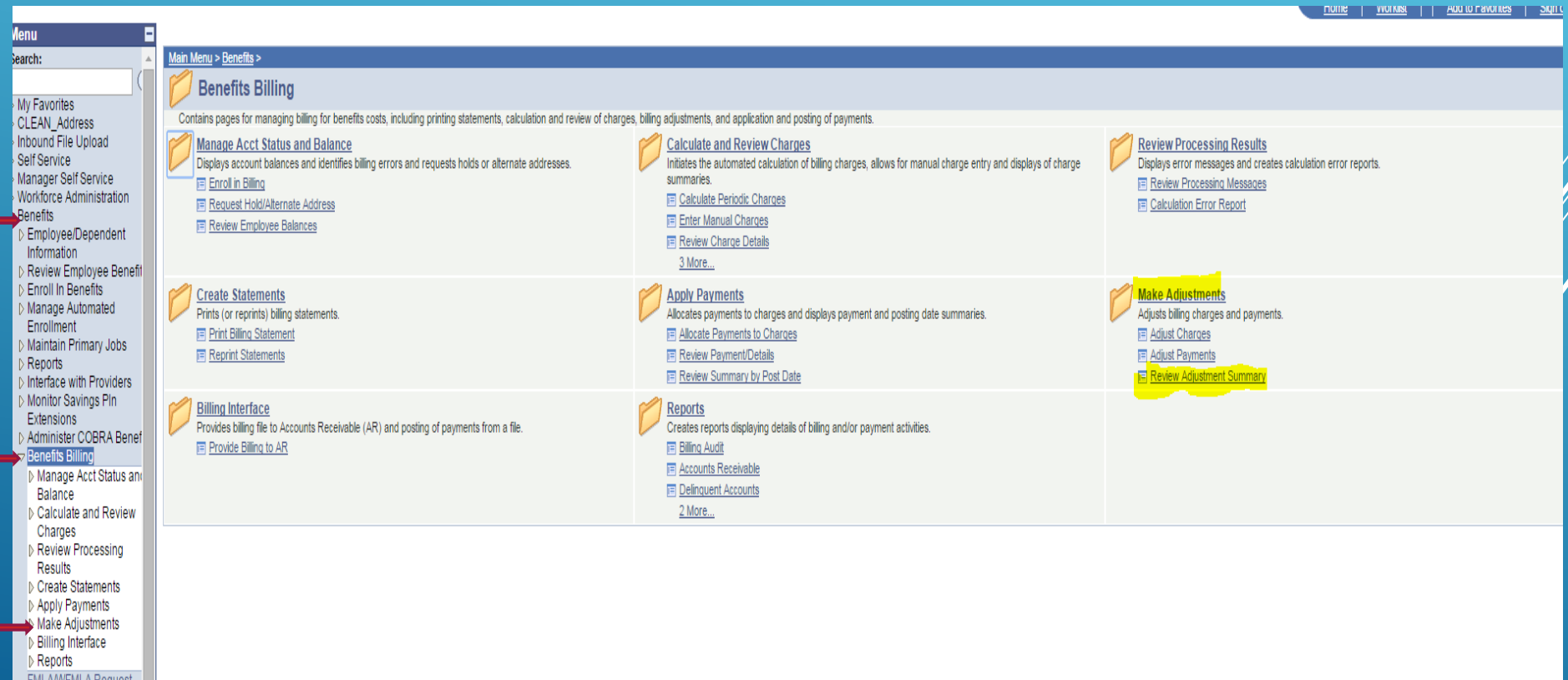
Return to Search

Notify

Benefits > Benefits Billing > Make Adjustments.....

- Review Adjustment Summary

Adjustments are made centrally at the UWSC. You can use this screen to see why the adjustment was made.



Benefits > Benefits Billing > Make Adjustments > Review Adjustment Summary

This page works well with the Review Charge Detail. It provides why the adjustment was done.

Menu

Search:

- My Favorites
- CLEAN_Address
- Inbound File Upload
- Self Service
- Manager Self Service
- Workforce Administration
- Benefits
 - Employee/Dependent Information
 - Review Employee Benefit
 - Enroll In Benefits
 - Manage Automated Enrollment
 - Maintain Primary Jobs
 - Reports
 - Interface with Providers
 - Monitor Savings Plan Extensions
 - Administer COBRA Benefit
 - Benefits Billing
 - Manage Acct Status and Balance
 - Calculate and Review Charges
 - Review Processing Results
 - Create Statements
 - Apply Payments
 - Make Adjustments
 - Adjust Charges
 - Adjust Payments
 - Review Adjustment Summary
 - Billing Interface
 - Reports
 - FMLA/WFMLA Request
 - Time and Labor
 - Payroll for North America
 - Global Payroll & Absence Mgmt
 - Payroll Interface
 - Workforce Development
 - Organizational Development
 - Workforce Monitoring
 - Campus Community
 - Student Admissions
 - Records and Enrollment
 - Financial Aid
 - Set Up HRMS
 - Set Up SACR
 - Enterprise Components
 - UW Absence Management Reports

Adjustm. Summary

Person ID: [REDACTED]

Posting Date	Adjustment Type	Adj Amount	Adjustment Description	SFS Funding Adjustment	Entry Date/Time	Entered By
02/03/2015	Payment Adjustment	-230.00	My error - the original deposit was from a refund for SGL and was to be credited to his old charges first. The payment was properly applied.	No	02/03/15 3:26:58PM	00108513
02/03/2015	Payment Adjustment	-230.00	Payment Plan was suppose to be allocated to current charge first instead of past charges	No	02/03/15 3:10:16PM	00108513
01/31/2015	Charge Adjustment	-21.60	Wiscit 1009659 Premium waiver SGL effective 5/1/14			
01/31/2015	Charge Adjustment	-7.20	Wiscit 1009659 Premium waiver SGL effective 5/1/14			
01/31/2015	Charge Adjustment	-5.00	Wiscit 1009659 Premium waiver SGL effective 5/1/14			
01/31/2015	Charge Adjustment	-7.20	Wiscit 1009659 Premium waiver SGL effective 5/1/14			
01/31/2015	Charge Adjustment	-5.00	Wiscit 1009659 Premium waiver SGL effective 5/1/14			
01/31/2015	Charge Adjustment	-5.00	Wiscit 1009659 Premium waiver SGL effective 5/1/14			
01/31/2015	Charge Adjustment	-21.60	Wiscit 1009659 Premium waiver SGL effective 5/1/14			
01/31/2015	Charge Adjustment	-21.60	Wiscit 1009659 Premium waiver SGL effective 5/1/14			
01/31/2015	Charge Adjustment	-5.00	Wiscit 1009659 Premium waiver SGL effective 5/1/14			
01/31/2015	Charge Adjustment	-21.60	Wiscit 1009659 Premium waiver SGL effective 5/1/14			
01/31/2015	Charge Adjustment	-20.51	Wiscit 1009654 paid on 2013BW05			
01/31/2015	Charge Adjustment	-21.60	Wiscit 1009659 Premium waiver SGL effective 5/1/14			
01/31/2015	Charge Adjustment	-21.60	Wiscit 1009659 Premium waiver SGL effective 5/1/14			
01/31/2015	Charge Adjustment	-7.20	Wiscit 1009659 Premium waiver SGL effective 5/1/14			
01/31/2015	Charge Adjustment	-7.20	Wiscit 1009659 Premium waiver SGL effective 5/1/14			
01/31/2015	Charge Adjustment	-7.20	Wiscit 1009659 Premium waiver SGL effective 5/1/14			

Institutional Updates & Feedback

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

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

Calendar Review

February 2015						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
1 [2M] Pay Period Begin	2	3	4	5 [1B] Pay Date	6	7 [2A] Pay Period End
8 [2B] Pay Period Begin [2A] 1st Batch Prelim Calc	9 [2A] 2nd Batch Prelim Calc	10 [2A] 3rd Batch Prelim Calc [2A] Payroll and Benefit Retro and Payline Load	11 [2A] 4th Batch Prelim Calc [2A] FICA Deadline	12 [2A] Confirmation Deadline (Eve) [2A] Final Calc	13 [2M] 1st Batch Prelim Calc	14
15 [2M] 2nd Batch Prelim Calc	16 [2M] 3rd Batch Prelim Calc Washington's Birthday [Federal Reserve Bank Holiday]	17 [2M] 4th Batch Prelim Calc [2M] Payroll and Benefit Retro and Payline Load	18 [2M] FICA Deadline [2M] 5th Batch Prelim Calc	19 [2A] Pay Date [2M] Final Calc [2M] Confirmation Deadline (Eve)	20	21 [2B] Pay Period End
22 [3A] Pay Period Begin [2B] 1st Batch Prelim Calc	23 [2B] 2nd Batch Prelim Calc	24 [2B] Payroll and Benefit Retro and Payline Load [2B] 3rd Batch Prelim Calc	25 [2B] 4th Batch Prelim Calc [2B] FICA Deadline	26 [2B] Final Calc [2B] Confirmation Deadline (Eve)	27 [2M] Pay Date	28 [2M] Pay Period End

Calendar Review

← Today →

March 2015

3A 3B 3M

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

Questions?

