UNIVERSITY OF WISCONSIN
SERVICE CENTER

Affinity Group 3
May 19, 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
- Stale Checks
- LOA Checklist
- Short Work Break
- Annual ALRA Conversion
- TASC Training
- Institution Feedback & Updates
- Calendar Review
- Questions/Comments

Stale Checks

UNIVERSITY OF WISCONSIN SYSTEM

Financial Administration

780 Regent Street, Suite 255
Madison, Wisconsin 53715
(608) 263-6973 Fax: (608) 262-5316

Email: kcoffey@uwsa.edu
website: http://www.uwsa.edu/fadmin/

Name
Address
City, State Zip

May 4, 2015

UW System is in the process of reviewing any outstanding checks issued which are over five months old.

Below is a check that is outstanding:

Check number: ____

Amount: _____

Check Date : _____

Please verify this outstanding check, and based on your review, either deposit it (if *less* than six months old) or return to us as "VOID" within the next 30 days.

Please indicate the action taken:

- ☐ Deposited Check, as it was less than six months old
- ☐ Never received, please void and reissue by sending to this address:

  ____
  ____
  ____

- ☐ Received, please void and do not reissue.

  Reason: ____

Signature/Date: ____

Please send requests to:

UW System Administration
Attn: Kayla Coffey
780 Regent Street Suite 255
Madison WI 53715
kcoffey@uwsa.edu
608-263-6973

Leave of Absence Checklist

Employee Benefit Checklist (UWS-401)

For Employees Going on an Unpaid Leave of Absence (LOA)

www.wisconsin.edu/ohrwd/benefits/download/empcha/loa/loalist.pdf

- This is an Administrative Tool developed to be completed by Benefits Staff to assist with:
  - Counseling and decision making of the employee
  - Record of understanding between the employee and the UW Institution
  - Entering information into HRS
- If the employee chooses to lapse coverage, determine the paid through date and make note for HRS entry
  - They will have a special 30 enrollment upon return from leave to reenroll in the lapsed benefits

Short Work Break (SBK)

- SBK Batch Processing

  - The SBK Batch Process is scheduled to run on the evening of 05/27/2015 after all nightly HRS Batch processing has been completed.
  - All active C-basis employees will be put on a Short Work Break.

Annual ALRA Conversion

- Unclassified employees (academic staff, faculty and limited) with a 12-month appointment are eligible to bank unused vacation in an Annual Leave Reserve Account (ALRA). This is made available during their 11th fiscal year of employment. Note: The hours are placed in reserve at the <u>end</u> of that fiscal year. Unclassified vacation is allocated on a fiscal year basis. Unused vacation can be carried over into the following fiscal year, but must be used by the end of that fiscal year or it will be lost.

- The July Leave Report will indicate how many hours of unused vacation an employee is eligible to bank into ALRA. Eligible employees are allowed to bank any unused vacation as of June 30, 2015.

Annual ALRA Conversion

- If the employee meets the eligibility requirements for ALRA:
  - They may transfer unused vacation hours into an ALRA account to use at a future date (banked hours do not expire).
  - They may accumulate hours in the ALRA from year to year without limit.
  - Employees will be offered the option to bank hours in July following the fiscal year in which the employee qualifies.
  - Banking Schedule (the amount of leave that can be banked is prorated if part-time):
    - Employee is allowed to bank up to 40 hours of vacation into ALRA per year at the beginning of their 11th fiscal year of employment.
    - Employee is allowed to bank up to 80 hours of vacation into ALRA per year at the beginning of their 26th fiscal year of employment.
    - The hours are placed in reserve at the end of that fiscal year (the hours designated for ALRA will be included in the August Leave Report).

Annual ALRA Conversion

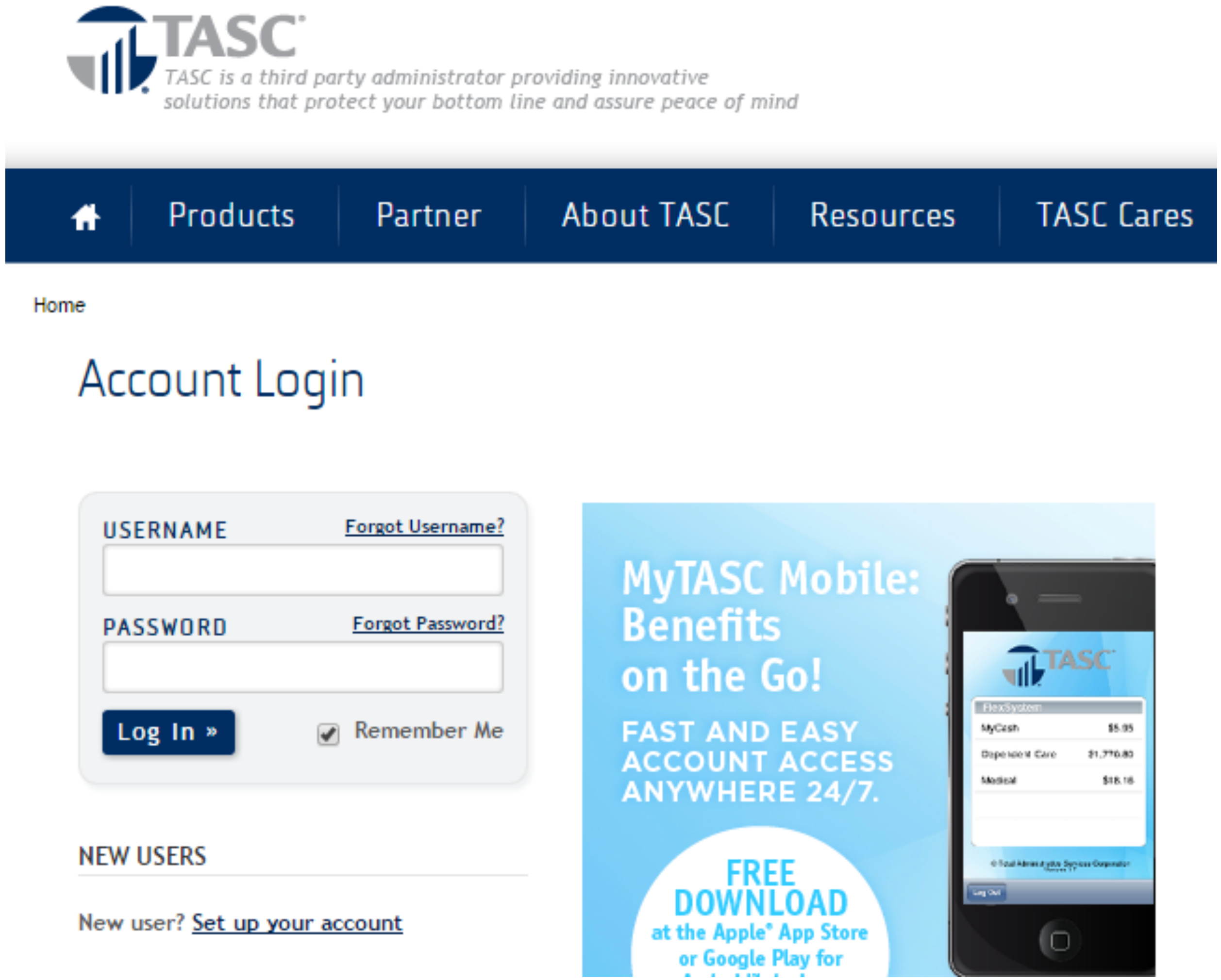
- When banking hours to ALRA, the vacation hours used will first come from any remaining Vacation Carryover as of June 30, 2015. If the employee allocates more unused vacation to ALRA than currently in Vacation Carryover, the additional hours to be banked will come from the new Vacation Carryover balance as of July 1, 2015 (vacation earned in the current fiscal year).

TASC Training

- Institution Benefit Coordinators will receive their login credentials to TASC Online the morning of May 19, 2015 (prior to the Affinity Group calls). Samantha Quinney will email a notification on May 18 so Benefits Coordinators can be watching for the login credentials the next morning.

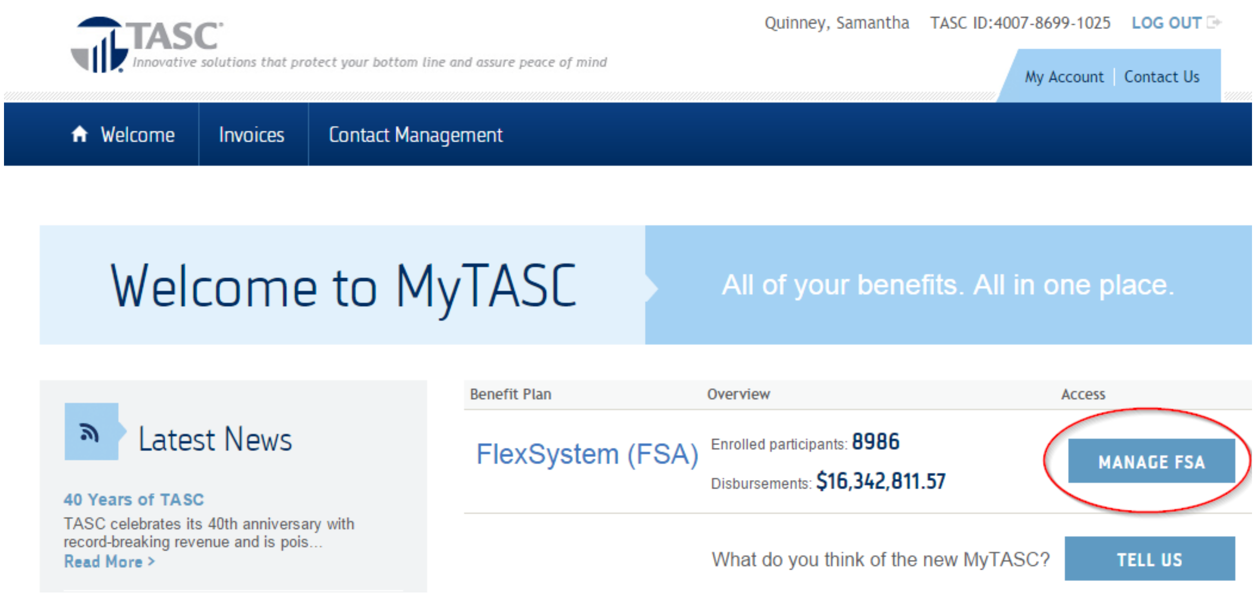
TASC Training

- http://www.tasconline.com
- Login to TASC account

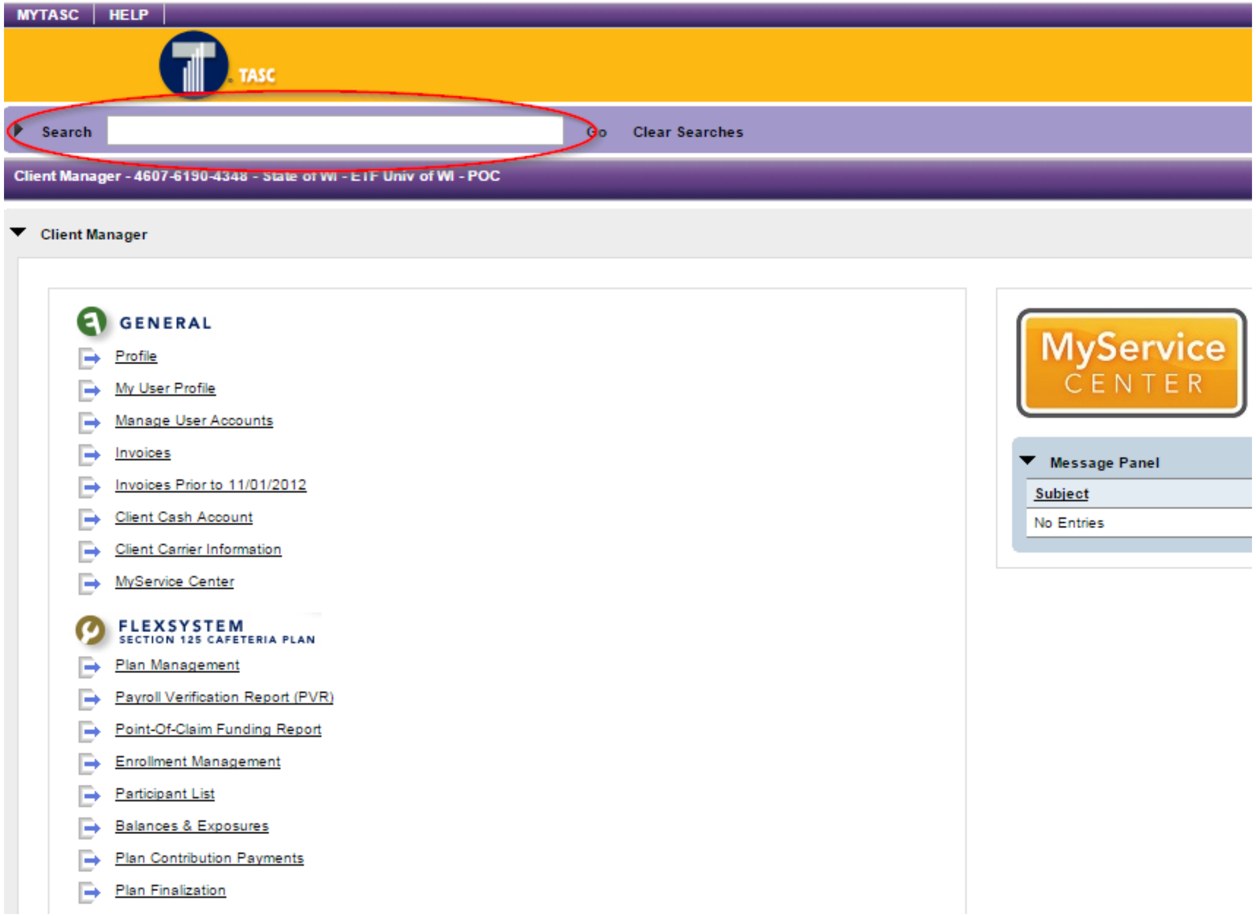


TASC Training

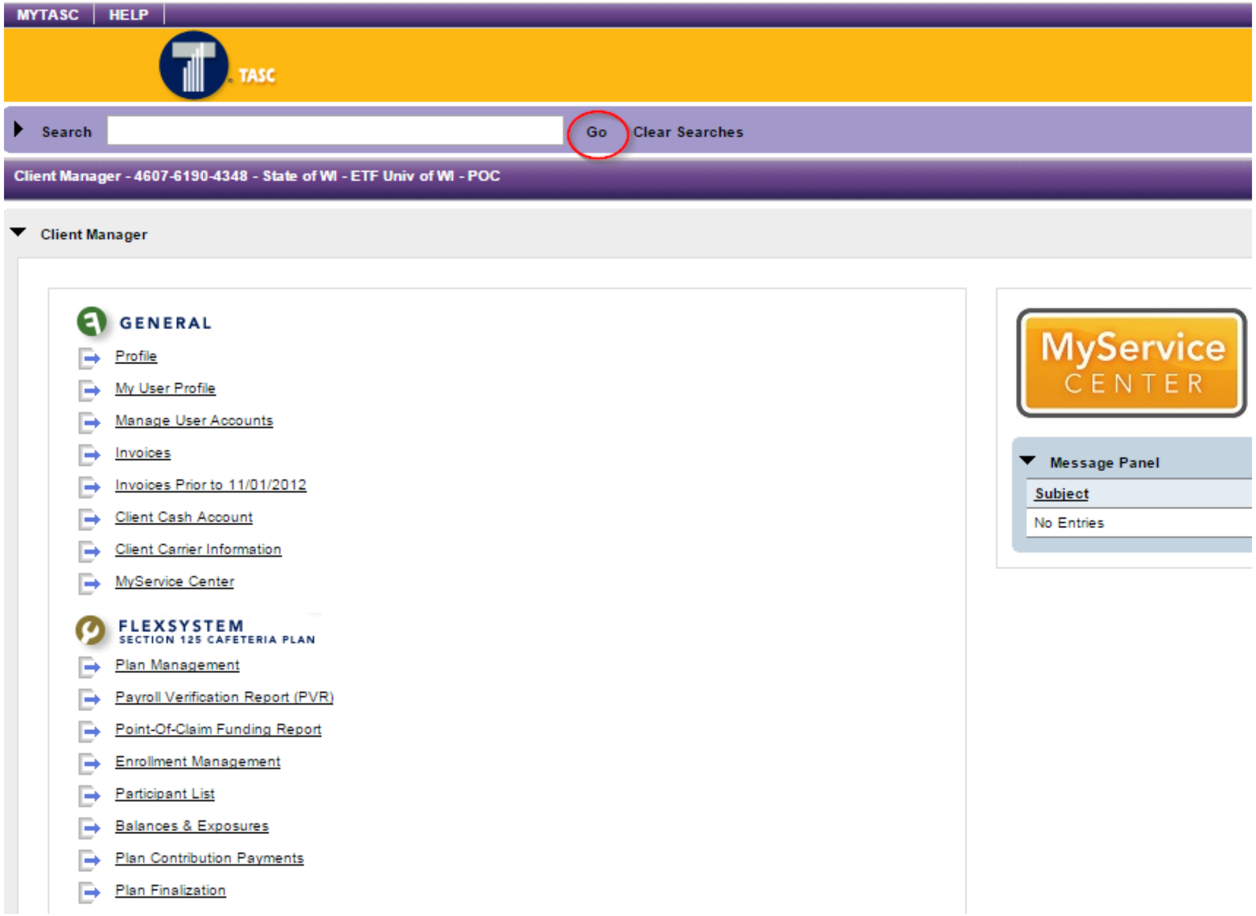
- To view your employees, click Manage FSA:



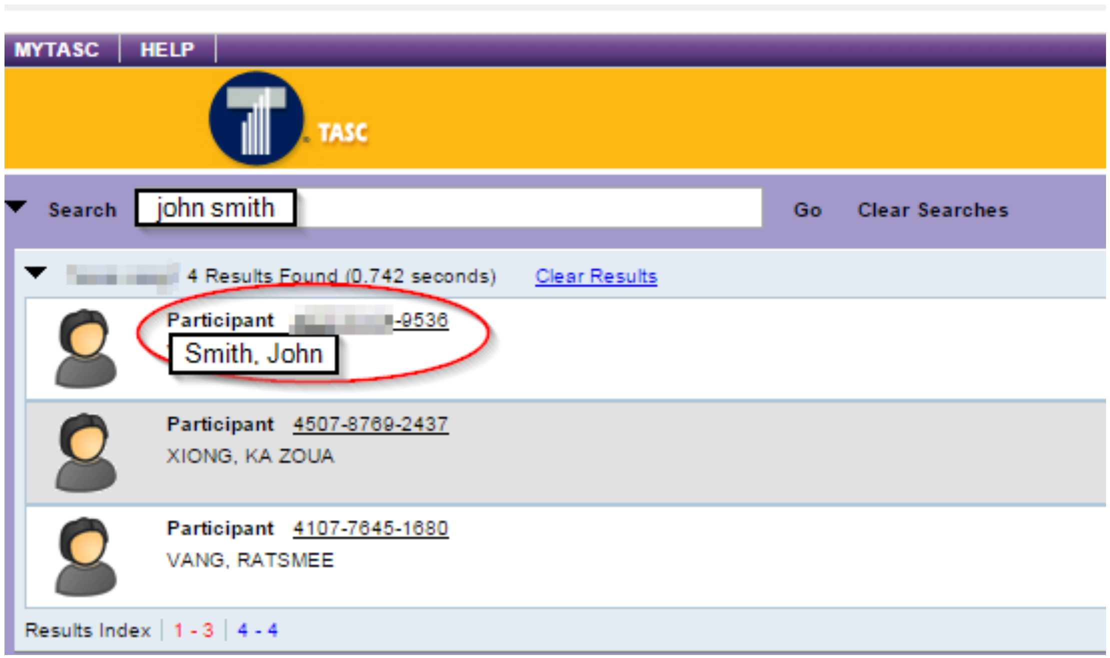
- You can search for an employee by TASC ID, by name, or by plan type. To search by name or TASC ID, put in their information into the "Search" bar:



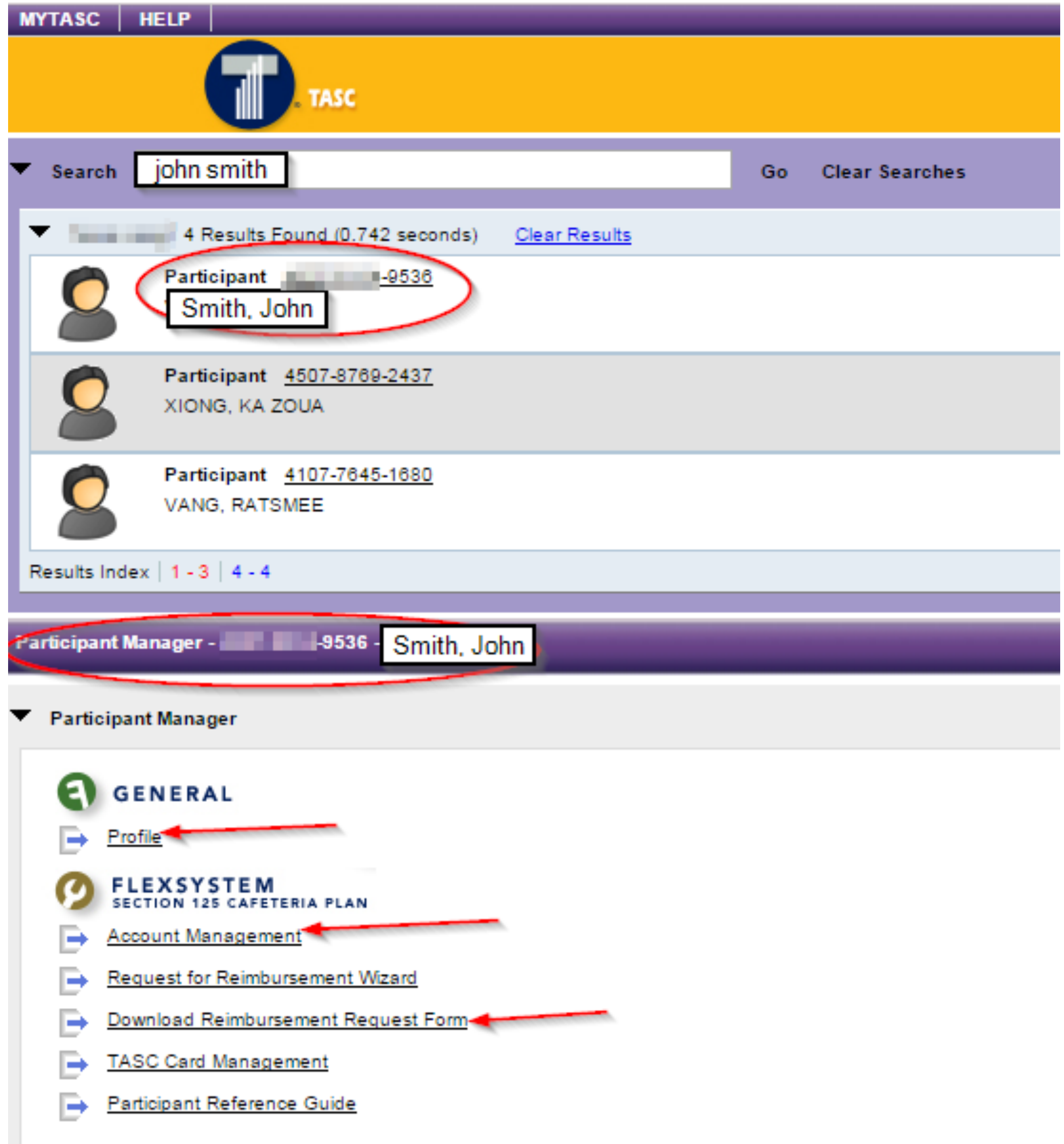
- Press “Go” or Enter button.



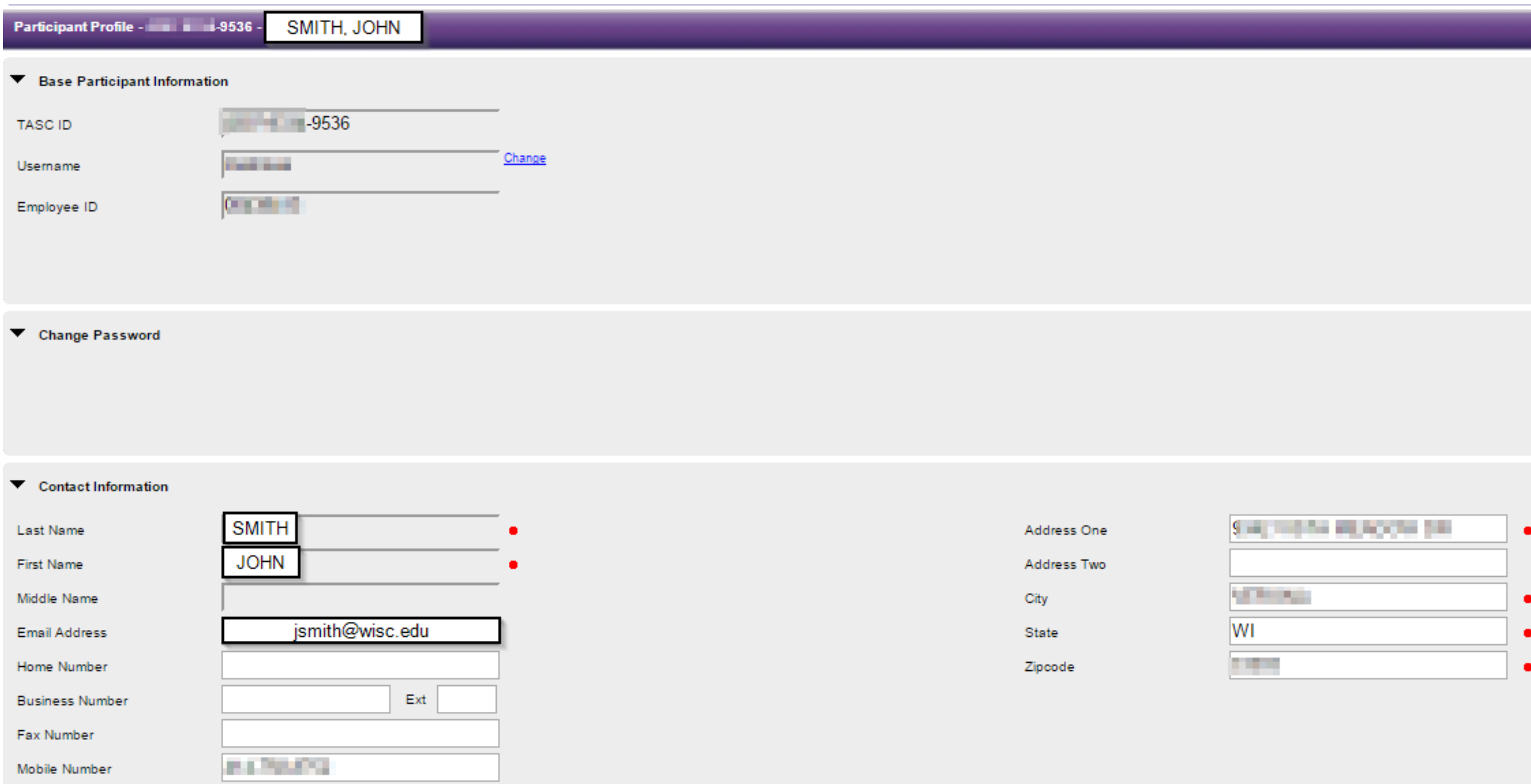
- After searching, it will bring down a list of people who match the criteria entered:



- Click on participant you want, and it will provide options for additional things you can see for employee:



- Profile will show you the employee's address, username, email, and phone number. Profile page:



Participant Profile - -9536 - SMITH, JOHN

Base Participant Information

TASC ID: -9536

Username: Change

Employee ID:

Change Password

Contact Information

Last Name: SMITH

First Name: JOHN

Middle Name:

Email Address: jsmith@wisc.edu

Home Number:

Business Number: Ext

Fax Number:

Mobile Number:

Address One:

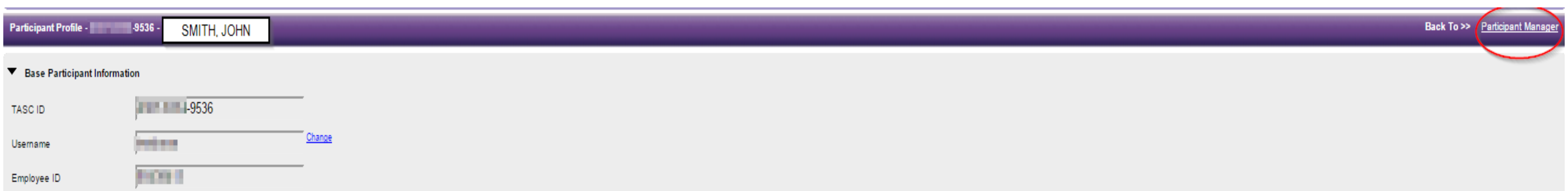
Address Two:

City:

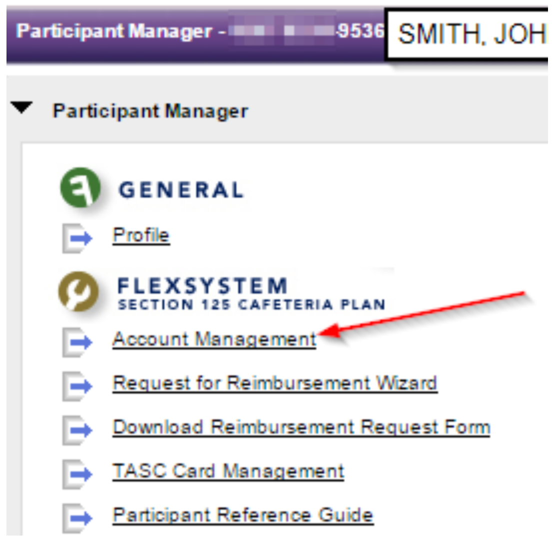
State: WI

Zipcode:

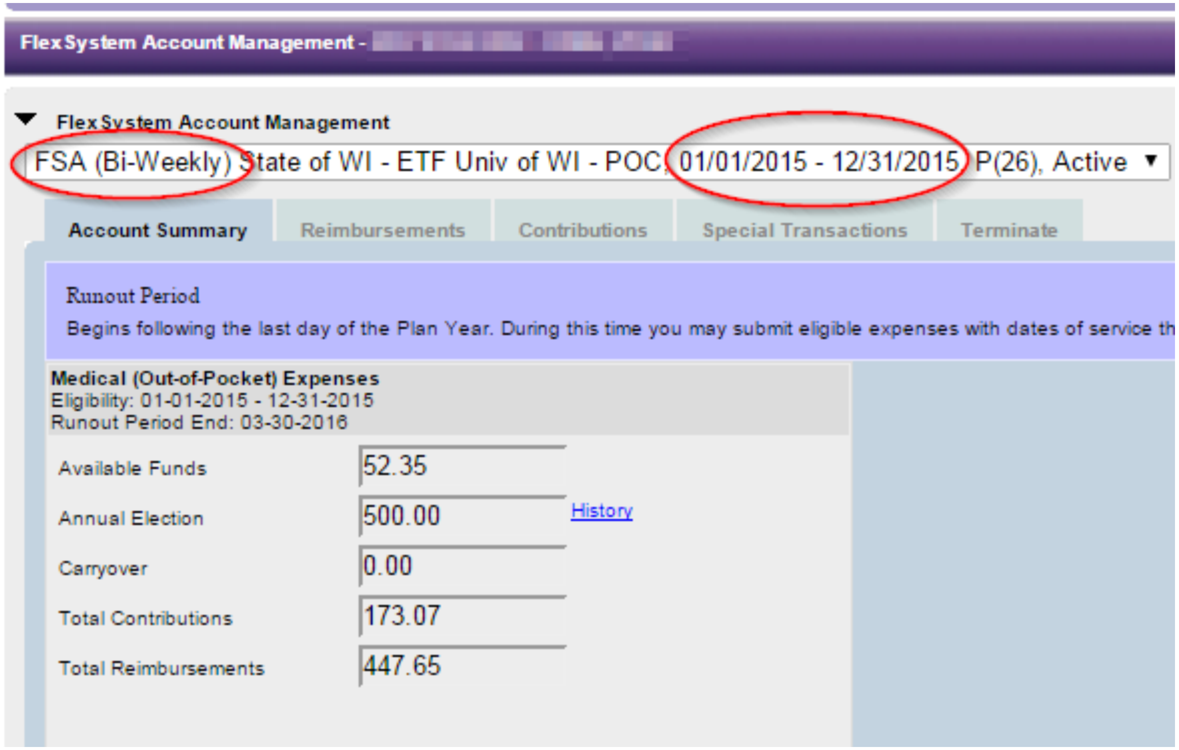
- To get out of the profile, but to stay on the employee, press the “Participant Manager” button in top right corner.



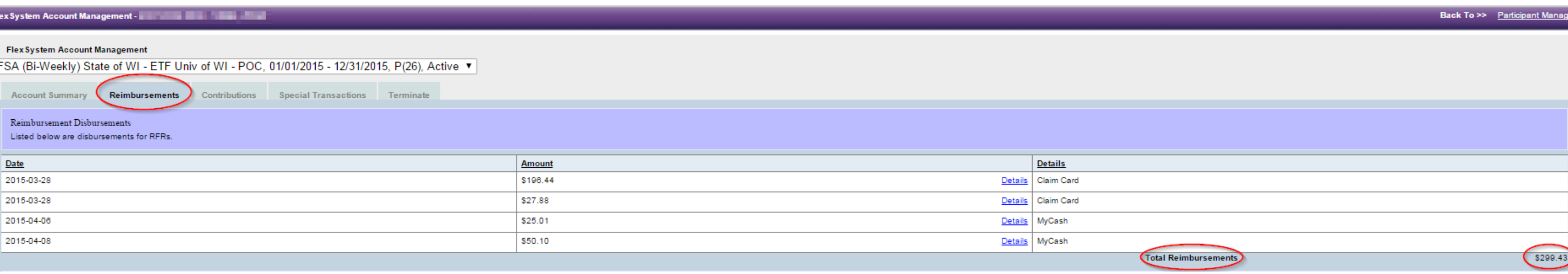
- Now you can go into their Account Management to see annual election amount, contributions-to-date, and reimbursements.



- To know what plan they are under, it shows at the top if they are FSA Bi-Weekly, FSA Monthly, FSA 9-pay; or LPFSA Bi-Weekly, LPFSA Monthly, LPFSA 9-pay.



- You can see what reimbursements were paid, pending, or denied:



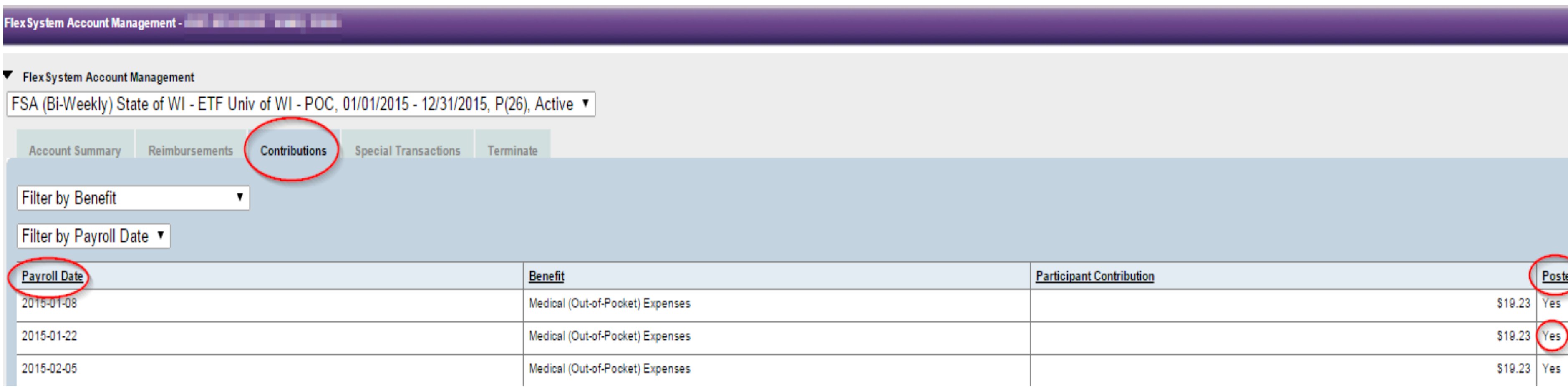
- You can see what day and how much was submitted for reimbursement:
- Veriflex Status. If it says “Receipts Required” it means that substantiation is required. Even if the TASC card is used it may still require substantiation to be submitted. If it’s not submitted, it will result in “unsubstantiated claims” at the end of the year. If the employee is submitting a claim (paid out of pocket, now seeking reimbursement) and it says, “Receipts Required,” then the claim will not be processed until substantiation is submitted.

Submitted RFRs
Listed are RFRs submitted to TASC.

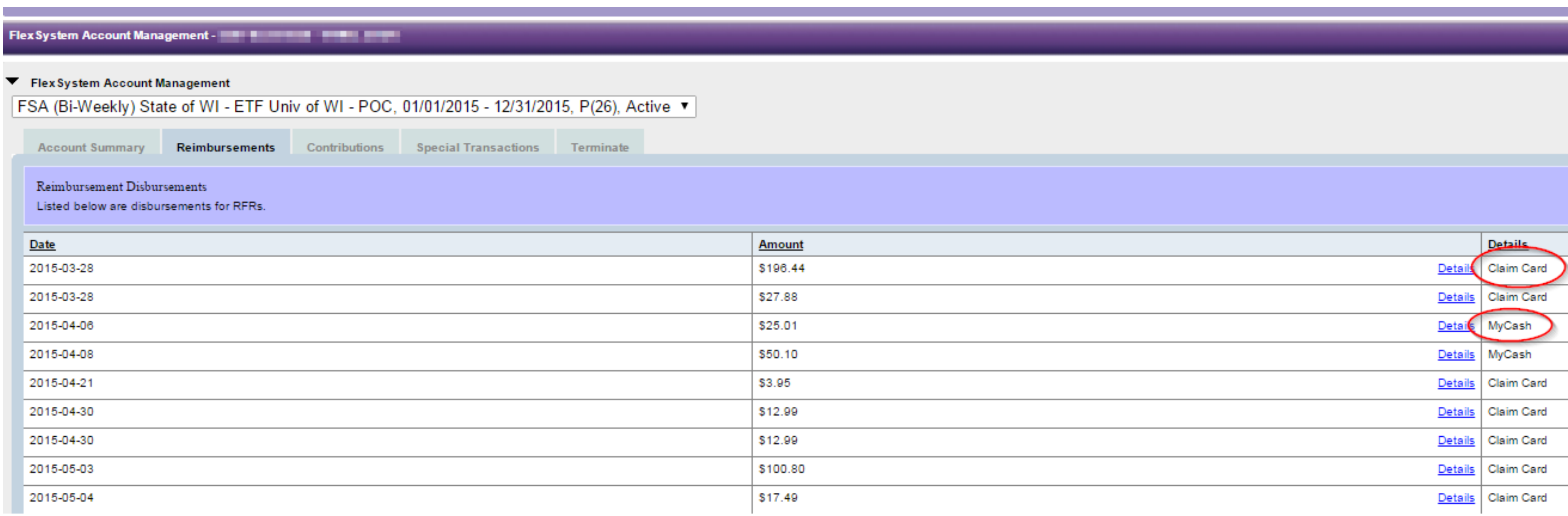
Filter by Benefit

Submitted	Request Id		Requested Amt.	Benefit	VeriFlex Status	Paid Status
2015-03-29	04728281501	Details	$196.44	Medical (Out-of-Pocket) Expenses	Verified	Paid
2015-03-29	04728281601	Details	$27.88	Medical (Out-of-Pocket) Expenses	Verified	Paid
2015-04-04	04753687401	Details	$6.00	Medical (Out-of-Pocket) Expenses	Verified	Paid
2015-04-04	04753687501	Details	$2.52	Medical (Out-of-Pocket) Expenses	Verified	Paid
2015-04-04	04753687601	Details	$16.49	Medical (Out-of-Pocket) Expenses	Verified	Paid
2015-04-04	04753687701	Details	$50.10	Medical (Out-of-Pocket) Expenses	Verified	Paid

- You can view contributions and see if funds have posted for pay date.



- This is where you can review Reimbursements via My Cash/Claim Card. “Claim Card” means employee used their TASC Debit Card. “MyCash” means employee used their own funds and were reimbursed. You can see what day and how much got reimbursed.


Flex System Account Management -

Flex System Account Management

FSA (Bi-Weekly) State of WI - ETF Univ of WI - POC, 01/01/2015 - 12/31/2015, P(26), Active

Account Summary | Reimbursements | Contributions | Special Transactions | Terminate

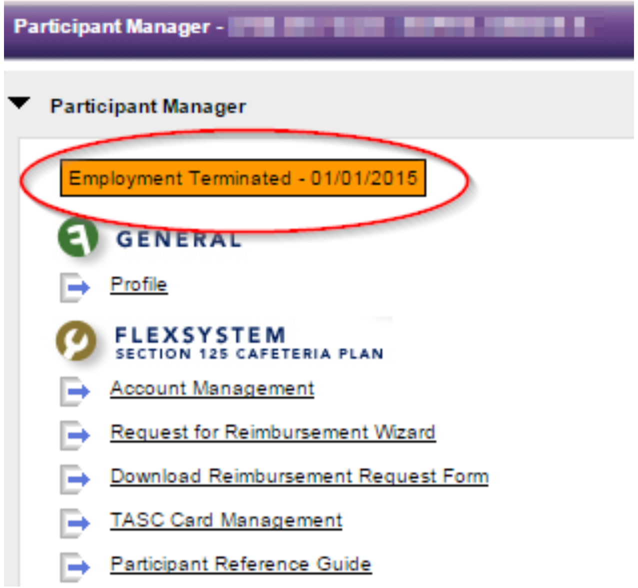
Reimbursement Disbursements

Listed below are disbursements for RFRs.

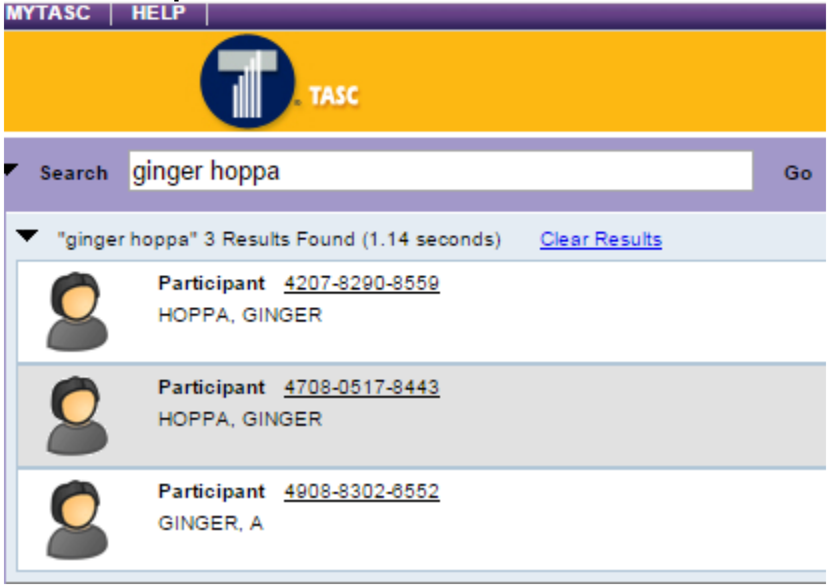
Date	Amount		Details
2015-03-28	$196.44	Details	Claim Card
2015-03-28	$27.88	Details	Claim Card
2015-04-06	$25.01	Details	MyCash
2015-04-08	$50.10	Details	MyCash
2015-04-21	$3.95	Details	Claim Card
2015-04-30	$12.99	Details	Claim Card
2015-04-30	$12.99	Details	Claim Card
2015-05-03	$100.80	Details	Claim Card
2015-05-04	$17.49	Details	Claim Card

FAQ

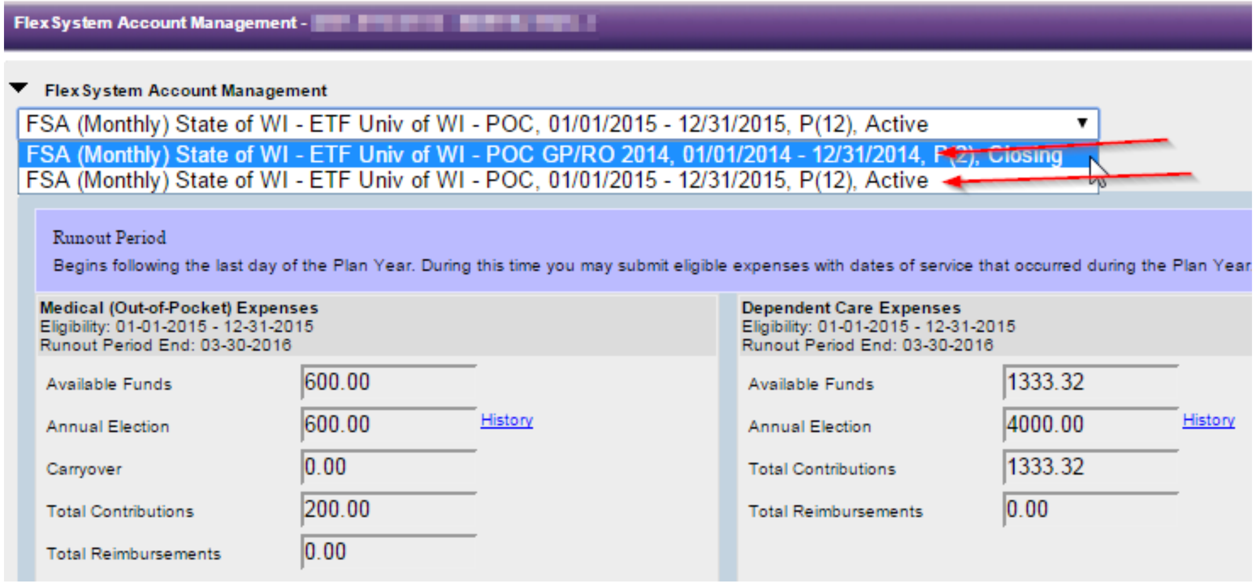
- **How do I know if someone's account is terminated?**
  a. If someone's account is terminated, a yellow box will be on top when you click to view that person's account. For example:



- **Why am I seeing two accounts for someone?**
  a. You are seeing two or more accounts because the person changed payroll frequencies (i.e. biweekly, monthly, 9-pay, or LPFSA). Only 1 account is active and it is the one with their current plan type and payroll frequency; the others are terminated.
  b. OR during the Takeover between WageWorks & TASC, TASC couldn't match up a person with their WageWorks account, so TASC created new account. Employees potentially could have a separate account for 2014 and 2015.
  c. Screenshot of multiple accounts:



- **How do I see if they had 2014 plan?**
  a. Search for employee, click on employee, click Account Management, then select from the drop down the year you want to look at. Screenshot below:

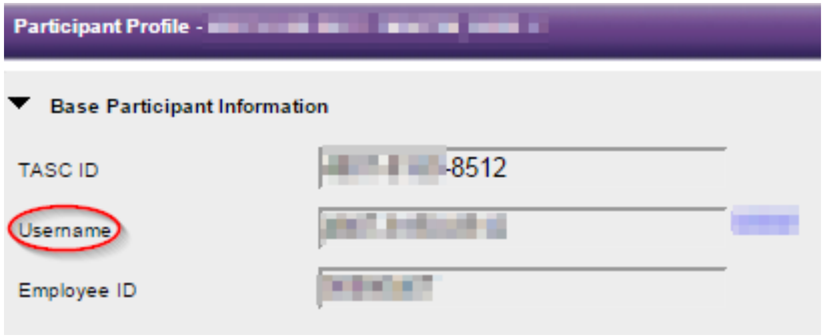


FAQ (continued)

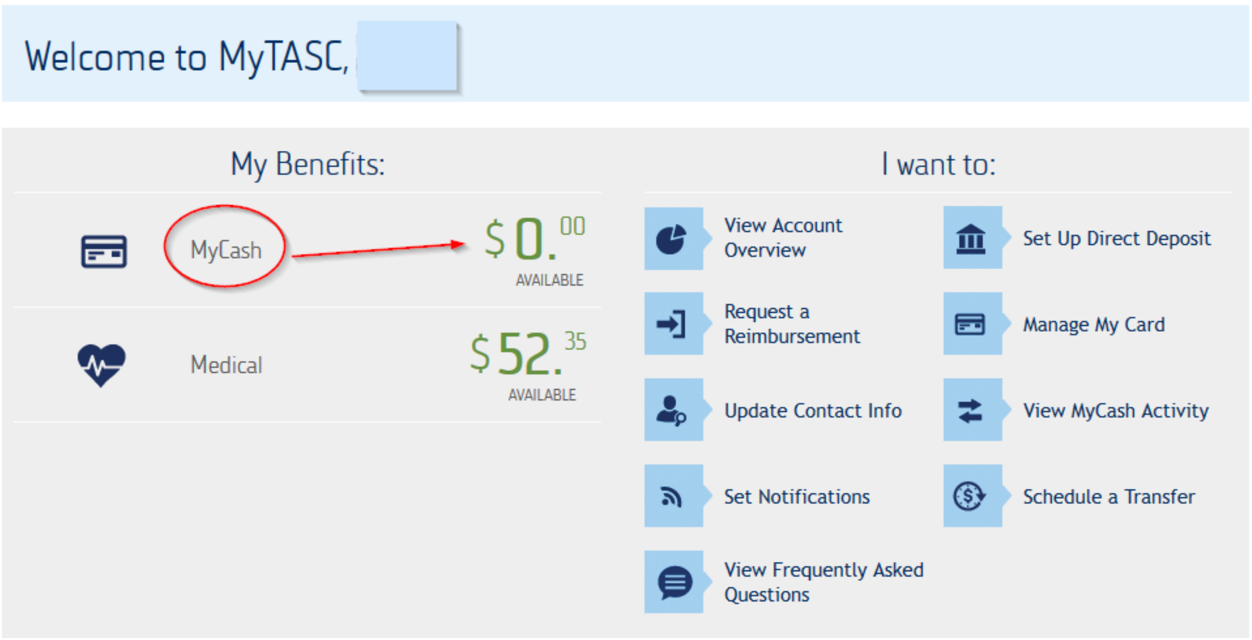
- **Employee had a qualifying event to change election amount, but the employee's annual election amount is incorrect in TASC, how do I fix it?**
  a. You will need to contact UWSC and we will work with TASC to fix.
- **Employee would like to update their address, name, email, phone, etc., how can they do this?**
  a. Employee can login into their account and change this themselves. You can give them their username to help them out. If they don't remember their password to get in, they can reset it. The password reset will be sent to their email account on file with TASC. If there is no email on file with TASC, you can add it.

FAQ (continued)

- **How do I see employee's username?**
    a. Search for employee, click on employee, click on Profile. Screenshot of where username is:

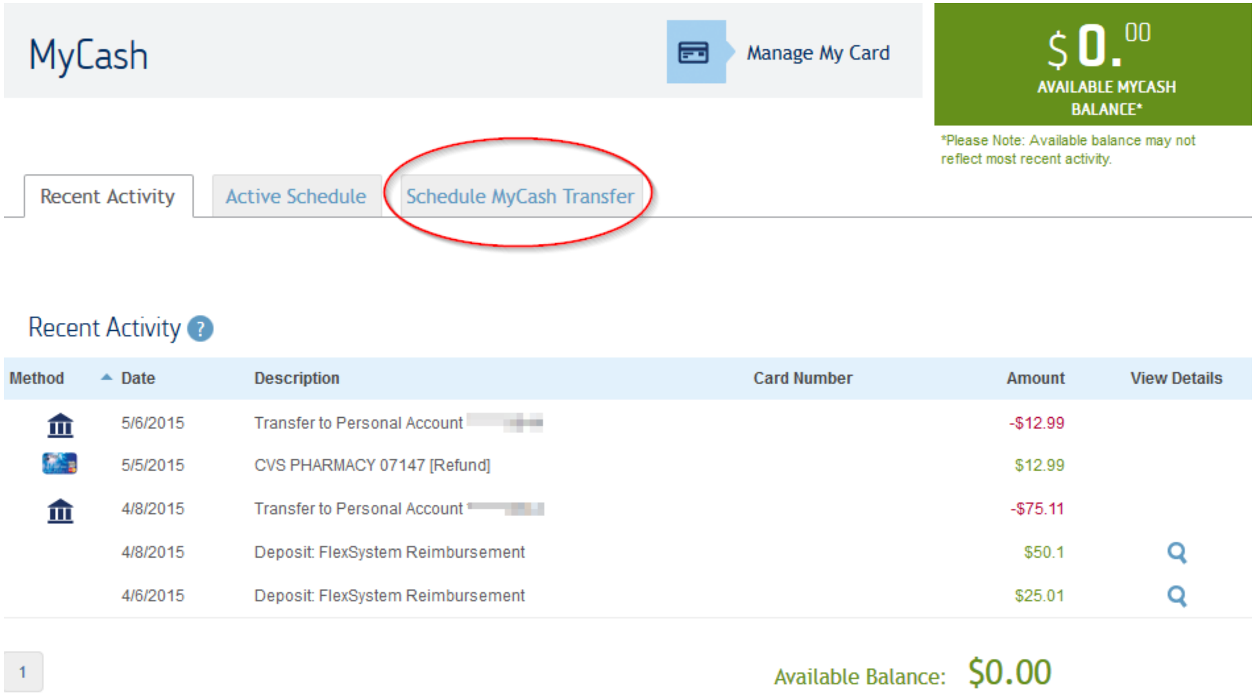


- **Why haven't I gotten reimbursed yet?**
  a. If receipts are required, the claim will not be processed. The employee needs to check their "VeriFlex Status" to see if receipts are needed for substantiation. Employees might have funds sitting in MyCash. They can see it when they login.



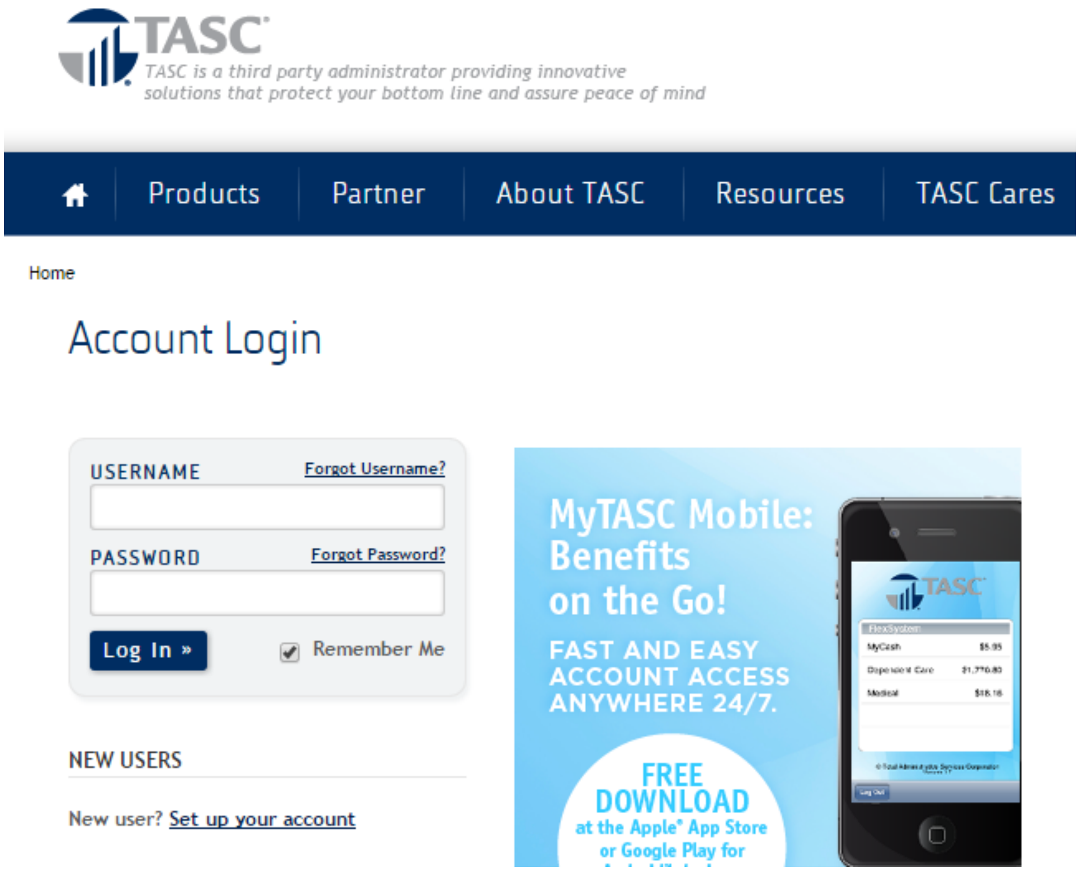
FAQ (continued)

- If money is in here, click on “MyCash”. Transfer your MyCash money to your bank account.



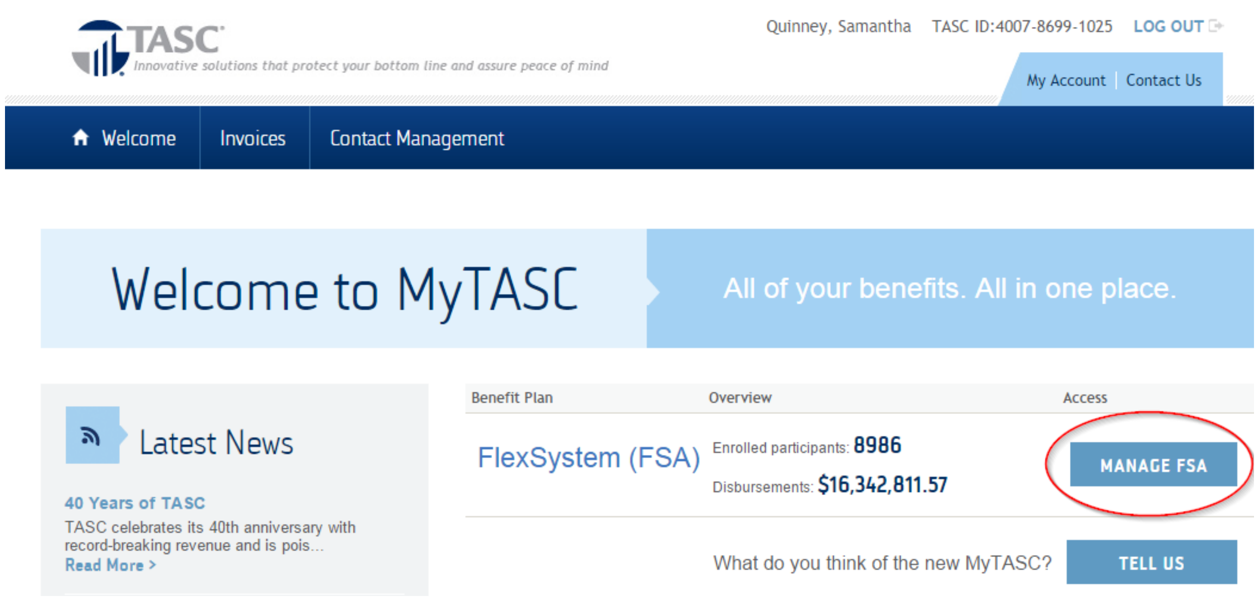
TASC: Other Options on TASC Site

- Login to TASC account

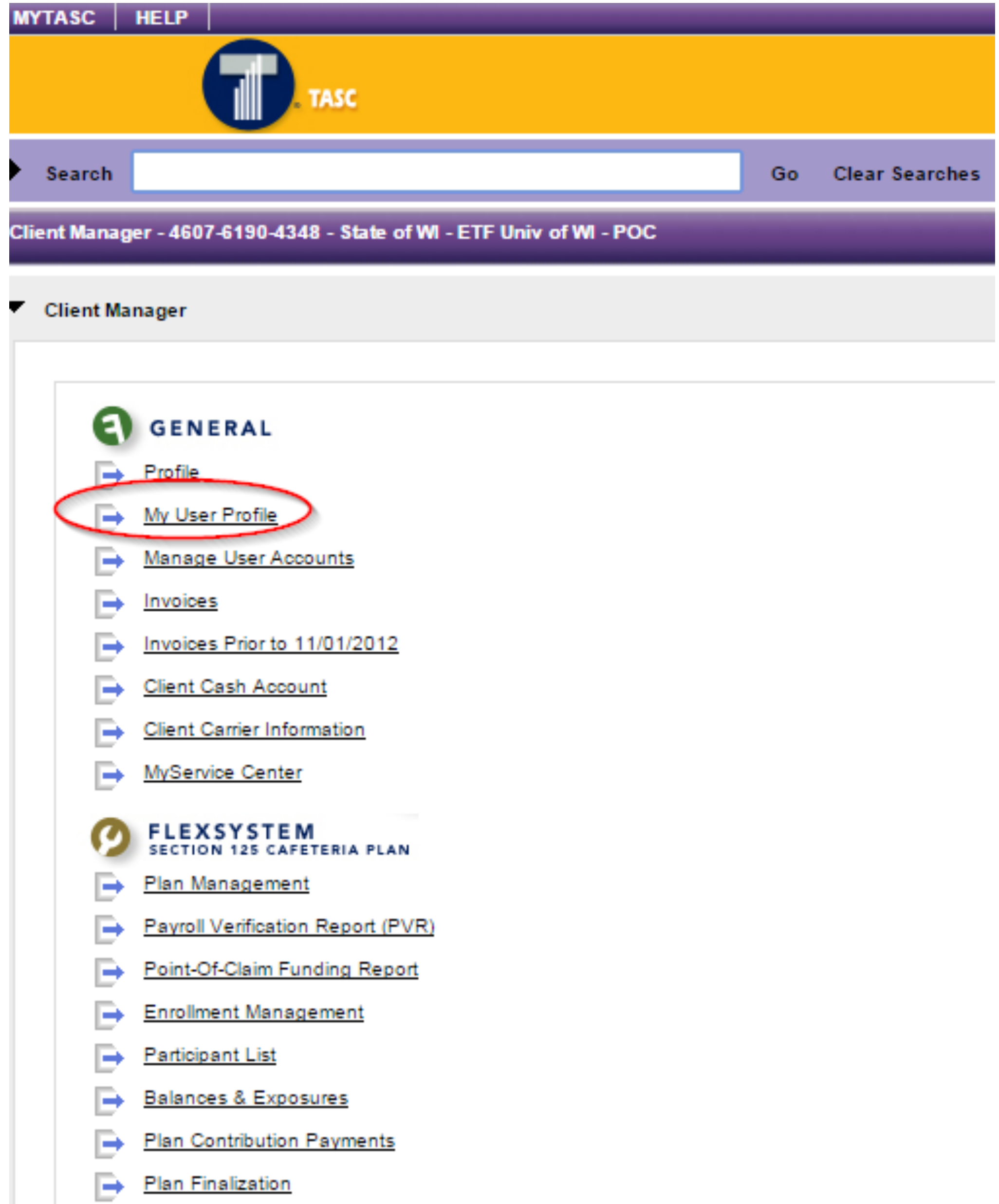


TASC: Other Options on TASC Site (cont.)

- click Manage FSA

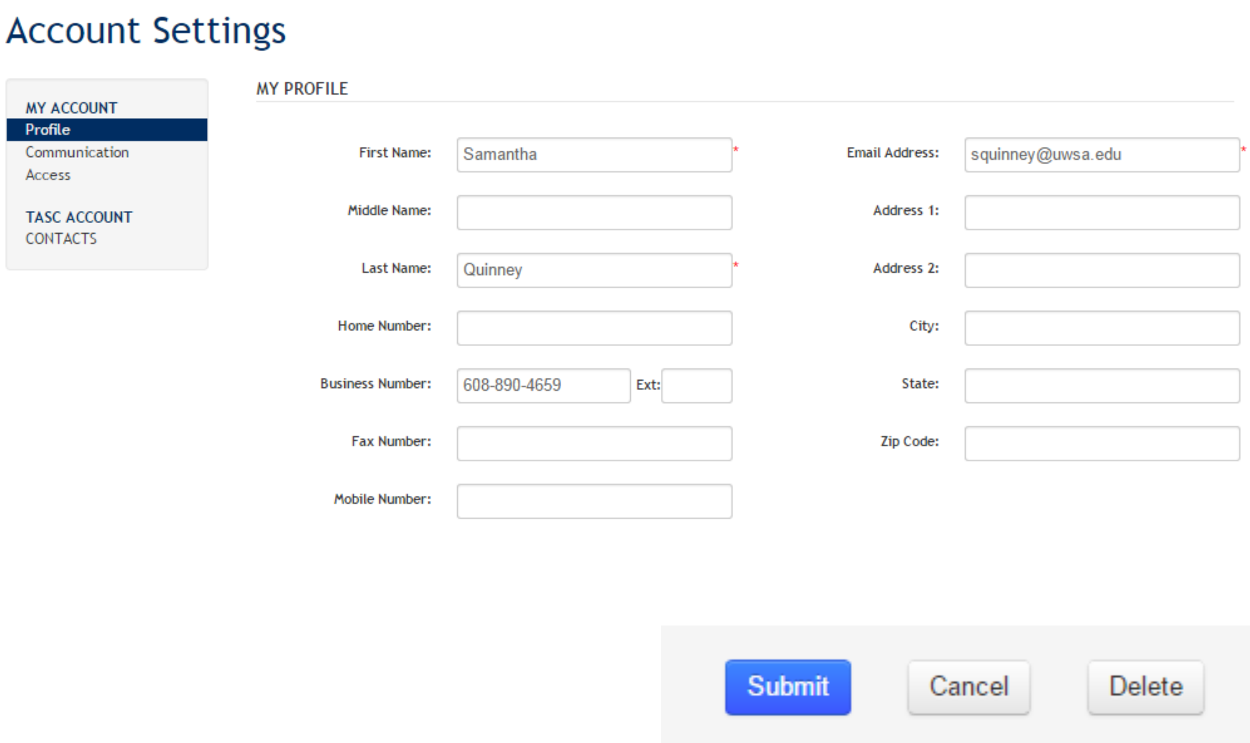


- Manage your User Profile



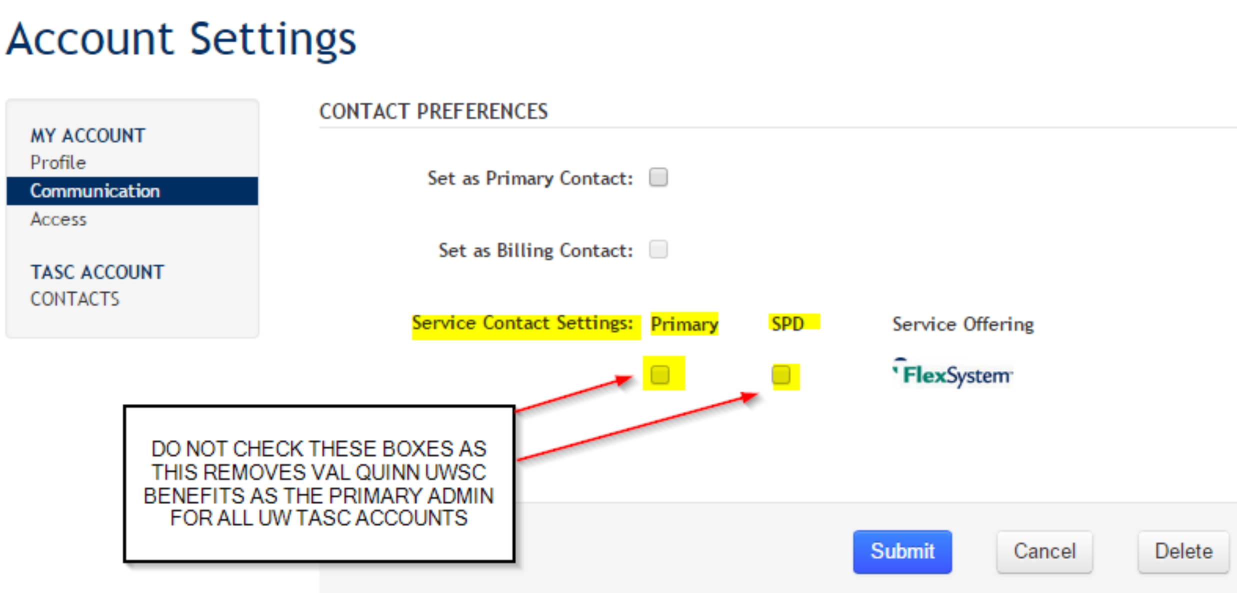
TASC: Other Options on TASC Site (cont.)

- You can add additional information



Warning!

- Communication Tab. Please AVOID checking these boxes highlighted below.



TASC

- Questions?

5B and 5M Payrolls Have Non-Standard Schedules

- **2015BW05B:**
  5/15/15 – Paysheets created (overnight)
  5/18/15 – Payline request deadline - 4:30 p.m.
  5/18/15 – Payline and retro load (overnight)
  5/19/15 – FICA deadline – Noon
  5/19/15 – Absence event entry best practice due date – 8:00 p.m.
  5/20/15 – Final calc/confirmation – Noon

  2015UNC05:
  5/21/15 – Paysheets created (overnight)
  5/22/15 – Payline request deadline – 4:30 p.m.
  5/23/15 – Payline and retro load (overnight)
  5/24/15 – FICA deadline – Noon
  5/25/15 – Absence event entry best practice due date – 8:00 p.m.
  5/26/15 – Final calc/confirmation – Noon

  Please also be aware that no payroll calculation jobs will be running the night of 5/25 (Memorial Day). Any payroll related changes made on the 25th will not be viewable on Review Paycheck or the Payroll Edit Report the morning of 5/26, but will be picked up in the 5M confirm that begins at noon on the 26th. Affinity Groups will monitor WiscITs over the Memorial Day Weekend.

UNIVERSITY OF WISCONSIN SERVICE CENTER

Institutional Updates & Feedback

- UW-Stout
- UW-Superior
- UW Colleges
- UW-Extension
- UW-Green Bay
- UW-Parkside
- UW-River Falls
- UW System Administration

Calendar Review

Today | 5A | 5B | 5C | 5M

May 2015

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

Questions?