



Affinity Group 3

August 16, 2016

- The University of Wisconsin Service Center will*
- *Serve...the people of the University of Wisconsin System*
 - *Collaborate...by being supportive and constructive*
 - *Act with Integrity...always and in all matters*

Agenda

- ABE
- HSA Employer Contribution
- Processing this Weekend
- Terminal Leave Payout Funding Reminder
- Benefit Retro Report Training
- Institution Feedback
- August 2016 Calendar Review
- Questions

Annual Benefits Enrollment (ABE)

Annual Benefits Enrollment (ABE) begins Monday, October 17, 2016

- UWSC will prepare the Open Enrollment events starting Friday, October 14, 2016 through Sunday, October 16, 2016
- UWSC will close the Open Enrollment events starting on Friday, November 11, 2016 through Sunday, November 13, 2016

ABE

FLSA changes effective Thursday, December 1, 2016

- UWSC HR Team will update Job Data sometime in November for employees moving from monthly to bi-weekly.
- UWSC Benefits Team will need to update current 2016 FSA Medical, LPFSA Medical, and FSA Dependent Care enrollment from the monthly plan to bi-weekly plan.
- UWSC Benefits Team will need to update future 2017 FSA Medical, LPFSA Medical, and FSA Dependent Care enrollment from the monthly plan to bi-weekly plan.

New WED Reports Training

All AG Meeting: August 30, 2016 @ 9:30 am

- Missing ICI ABBR
- Missing SGL ABBR
- Unrounded ABBR
- Mismatch ABBR
- ICI enrollment in both Plan Type 3Y and 3Z
- Open event requiring action
- Retro Queries

ABE

ABE Training: October 6 and 7, 2016

- Plan updates and policy changes
- System improvements
- Open Enrollment 101
 - Refresher on eBenefits enrollment and ADM event entry
 - Review timeline for enrollment entry and auditing

ABE Readiness

- **For a successful Annual Benefits Enrollment (ABE) and FLSA changes the following need to be kept current:**
 - New Hire Hold report
 - MSC Event Evaluation report
 - WED reports (additional reports will be rolled on 8/29/2016)
- What additional Open Enrollment topics are you interested in reviewing?
- **Contact your Affinity Group lead with questions or concerns with readiness.**

Questions



HSA Employer Contribution

- Active employees receive the full HSA Employer Contribution for 2016
 - \$750 for single; \$1,500 for family
- We will be catching up the HSA employer contribution for active employees on the 10B and 10M who enrolled after 1/1/2016
 - We will be sending institutions a list of employees by October 14

Questions



This Weekend Processing (August 19 & 20)

- Processing will begin Friday Evening
 - C Basis Return From Short Work Break
 - C Basis Rate Load (CAT to Mass Job Update)
 - C Basis Encumbrance Processes



Funding Lump Sum ALRA and Sabbatical Terminal Leave Payouts

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Funding for Sabbatical/ALRA Terminal Leave Payouts

- **Reminders:**
- If the individual terminates in FY16 but the Sabbatical/ALRA terminal leave is paid out after 7/1, the payout should be coded to the hiring department and to the payout codes that would have been used in FY16.
- This Funding can be used **only** for ALRA and Sabbatical terminal leave payouts and **not for** vacation or floating holiday termination payouts.
- Original slides below for reference.

Definition – ALRA and Sabbatical Terminal Leave

- **Faculty/academic staff** who have completed 10 or more fiscal years of continuous service may convert up to 40 hours of unused leave to an “Annual Leave Reserve Account (ALRA)” at the end of the fiscal year.
- **University staff**, dependent on their number of years of service, may transfer a certain amount of unused annual leave to “banked” or “sabbatical” leave at the end of the calendar year.
- The banked leave does not expire and accumulates from year to year.
- At the time an employee retires or terminates employment, a lump sum payment of the ALRA or banked sabbatical may occur, referred to as a “Terminal Leave Payout”.

- Effective July 2, 2016 funding strings have been setup for each business unit to be used exclusively for ALRA and Sabbatical terminal leave payouts
- Funding can be used **only** for ALRA and Sabbatical terminal leave payouts, not when taken as leave itself or for other leave payouts such as vacation or floating holiday termination payouts.
- Two new Earnings Code have been setup to be used only with the terminal leave payout funding:
 - TSB/TS8: Terminal Banked/Sabbatical Payout; Mapped to Account Code 1545 – University Staff – Lump Sum – Terminal Leave
 - TAL: Terminal ALRA Payout; Mapped to Account Code 1009 – Faculty-Lump Sum Terminal Leave or Account Code 1056 - Academic Staff - Lump Sum Terminal Leave

ALRA and Sabbatical Terminal Leave Funding Strings

Business Units should use the following funding strings to fund ALRA and Sabbatical Terminal Leave:

Business Unit	Fund	Department	Program	Project
Madison	136	980100	1	AAB1193
Milwaukee	136	980100	1	
Eau Claire	136	481010	1	
Green Bay	136	983500	1	
La Crosse	136	700175	1	
Oshkosh	136	507020	1	
Parkside	136	984100	1	
Platteville	136	323616	1	
River Falls	136	980825	1	
Stevens Point	136	025070	1	
Stout	136	982017	1	
Superior	136	983100	1	
Whitewater	136	304088	1	
Colleges	136	959583	1	
Extension	136	982600	1	
Administration	136	989997	1	
System	136	989997	1	

Funding Lump Sum ALRA and Sabbatical Terminal Leave Payouts

- KB 18173 <https://kb.wisc.edu/hrs/page.php?id=18173> provides detailed information on funding entry to charge ALRA and Sabbatical terminal leave payouts to a specific fund. Sample entry:

Funding Data Entry

SetID: SHARE Department: A451013 LAW/LAW SCHOOL/RESEARCH CTRS
Fiscal Year: 2017 Budget Begin Date: 07/01/2016 Budget End Date: 06/30/2017

Budget Data Find | View All First 1 of 1 Last

Department Position Appointment ID: 00000000 Empl Rcd#: 0

Eff Date	Eff Seg	Comp Rate	Job Code	Job Descr	Pos Nbr	Pay Basis	FTE %
04/01/2016	0	75.833333	R07BN	SR ADMIN PRGM SPEC	00000057	Annual	1.000000

*Effective Date: 07/02/2016 Eff Seq: 0 *Status: Active Date Entered: 05/18/2016 Used by Distribution Process:

Last Changed By:

Funding Distribution Personalize | Find | First 1-2 of 2 Last

*SEQ#	GL Business Unit	Fund	DeptID	Program	Project	Project End Date	Distrib %	ERNCD
1	UWMSN	136	980100	1	AAB1193	12/31/2099	100.000	TAL
2	UWMSN	101	45103	2			100.000	

Total By Pay Period

Save Notify Add Update/Display Include History Correct History

Example of funding entry that will charge terminal leave payout to specific fund

Questions?

- Policy and Funding String Related:
 - Contact Bryan Peters
608-262-7957
bpeters@uwsa.edu
- Entry into HRS:
 - Contact your appropriate Affinity Group
 - Affinity Group 1:** (888) 298-0141 (toll free) or (608) 262-0600
ag1@uwsa.edu
 - Affinity Group 2:** (888) 298-0151 (toll free) or (608) 262-0419
ag2@uwsa.edu
 - Affinity Group 3:** (888) 298-4159 (toll free) or (608) 262-6093
ag3@uwsa.edu

Benefit Retro

- What Triggers Retro Activity?
 - Enrollment entry into HRS where the deduction begin date has already passed.
 - Job Data entry (termination, retirement, layoff)
 - On-Demand event re-processing

BN Retro Timeline

- Timeline
 - Retro processes run every evening. Amounts are calculated and available for review the next day
 - Retro amounts remain in a calculated status. Changes can be made by Campus BN Admins until the next payroll
 - With a normal payroll cycle, retro amounts load on Tuesday night. Deductions will appear in Review Paycheck on Wednesday. At this point, incorrect deductions can only be changed by the Service Center
 - Benefit retro will not calculate and load in the same evening.

BN Retro Statuses

- Retro Statuses
 - Not Processed: current day's activity. Retro has been triggered but needs to go through nightly processing
 - Calculated: Nightly retro processing has determined amounts
 - Loaded to PS: Amounts have loaded to paysheets and will be refunded or charged
 - Invalid: Amount was not calculated
 - Rejected: Amount was not calculated

Benefit Retro

- Where Can Retro Be Reviewed in HRS?
 - Payroll for North America > Retroactive Payroll > Benefits/Deductions > Update Retro Ded Calc

Retro Ben/Ded Calc Results

Empl ID:

Empl Rcd#: 0

Retro EffDt: 07/01/2016

Status: Calculated

Mass Rqst ID:

Retro Seq#: 8250319

Duplicate Flag: N

Retroactive Deduction Data

Find | View All

First 1 of 6 Last

Company: UWS

Benefit Program: U02

Old Ded Amount: 217.00

Pay Group: ARG

Plan Type: 10

New Ded Amount: 0.00

Pay End Date: 07/31/2016

Benefit Plan: UNITNE

Override Ded Amt:

Page #: 263

Coverage Code:

Retro Ded Amount: -217.00

Line #: 18

Deduction Code: UNITNE

OK To Process

Deduction Class: B

Off Cycle

Exception

Save

Return to Search

Previous in List

Next in List

Notify

BN Retro Queries

- Reporting Tools > Query > Query Viewer
- UW_BN_UNCLSFD_RETRO
- UW_BN_CLSFD_RETRO
- Displays positive amounts (charges) or negative amounts (refunds) in a calculated status with OK to process checked. \$0.00 amounts not included

DeptID	Pay Group	Name	Empl ID	Empl Rcd#	Plan Type	Benefit Plan	Ben Progm	Coverage Code	Retro Ded Effective Date	Deducted Amount	New Deducted Amount	Deducted Amount Override	Retro Deduction Amount	Ded Class
	ARG	DOUGHERTY			02N	SGLSUP	U02		6/1/2016	3.96	4.23	0.00	0.27	T
	ARG	DOUGHERTY			014	VSP	U02	16	6/1/2016	6.54	13.08	0.00	6.54	B
	ARG	DOUGHERTY			02N	SGLSUP	U02		6/1/2016	3.96	4.23	0.00	0.27	T
	ARG	DOUGHERTY			013	DWISEL	U02	16	6/1/2016	20.52	42.19	0.00	21.67	B
	ARG	DOUGHERTY			010	WEAE	U02	15	6/1/2016	697.70	1733.50	0.00	1035.80	N
	ARG	DOUGHERTY			010	WEAE	U02	15	6/1/2016	86.00	217.00	0.00	131.00	B
	ARG	DOUGHERTY			014	VSP	U02	16	6/1/2016	6.54	13.08	0.00	6.54	B
	ARG	DOUGHERTY			013	DWISEL	U02	16	6/1/2016	20.52	42.19	0.00	21.67	B

Benefit Retro

- How Often should you review?
 - Daily is Best
- What are you looking for?
 - Validation that catch up premiums are being taken for new coverage. Reduces after the fact reconciliations and adjustments.
 - Retroactive Job Terminations – benefit coverage cannot be retroactively termed. Provides early notification for a BN Admin to start the communication with HR/Dept
 - Prevent unintended refunds

Action Items

- Possible actions to take
 - You agree with the amounts: Do nothing. They will load on the next payroll.
 - You agree retro amounts are needed but do not agree with amount calculated: enter override amount on Update Retro results page or submit a WiscIT for a payline
 - If a retroactive job termination is identified, retro should be unchecked until validation can be obtained the employee can be refunded
 - Old effective dates: unless you are positive they are correct, uncheck the OK to process and submit a WiscIT

KB Resources

- <https://kb.wisc.edu/hrs/page.php?id=19177> : Retro Benefit Review Process
- <https://kb.wisc.edu/hrs/page.php?id=20583> : University Staff (Classified) Retro Benefits Query
- <https://kb.wisc.edu/hrs/page.php?id=20826> : FA/AS/LI (Unclassified) Retro Benefits Query

Institution Feedback

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

Calendar Review – August 2016

August 2016						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
31	1 [8M] Pay Period Begin [7M] Pay Date	2	3	4 [7B] Pay Date	5	6 [8A] Pay Period End
7 [8A] 1st Batch Prelim Calc [8B] Pay Period Begin	8 [8A] 2nd Batch Prelim Calc	9 [8A] 3rd Batch Prelim Calc [8A] Payroll and Benefit Retro and Payline Load	10 [8A] 4th Batch Prelim Calc [8A] FICA Deadline	11 [8A] Final Calc [8A] Confirmation Deadline (Eve)	12 [8M] 1st Batch Prelim Calc	13
14 [8M] 2nd Batch Prelim Calc	15 [8M] 3rd Batch Prelim Calc	16 [8M] 4th Batch Prelim Calc [8M] Payroll and Benefit Retro and Payline Load	17 [8M] FICA Deadline [8M] 5th Batch Prelim Calc	18 [8A] Pay Date [8M] Confirmation Deadline (Eve) [8M] Final Calc	19	20 [8B] Pay Period End
21 [9A] Pay Period Begin [8B] 1st Batch Prelim Calc	22 [8B] 2nd Batch Prelim Calc	23 [8B] 3rd Batch Prelim Calc [8B] Payroll and Benefit Retro and Payline Load	24 [8B] FICA Deadline [8B] 4th Batch Prelim Calc	25 [8B] Confirmation Deadline (Eve) [8B] Final Calc	26	27
28	29	30	31 [8M] Pay Period End	1	2	3

Questions?

