UW UNIVERSITY OF WISCONSIN SYSTEM
SERVICE CENTER

WED Reports
August 30th, 2016

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.

Agenda

- Annual Base Benefit Rate (KB# 17090)
- SGL Missing/Incorrect ABBR (KB# 46905)
- ICI Missing/Incorrect ABBR (KB# 46246)
- ABBR Unrounded Report (KB# 48479)
- ABBR Mismatch (KB# 18118)
- ICI Co-Elect Enrollment Report (KB# 46903)
- ICI Missing Enrollment Report (KB# 20826)
- BAS Open Action Required Report (KB# 16486)
- Benefit Retro Queries (KB# 20583)
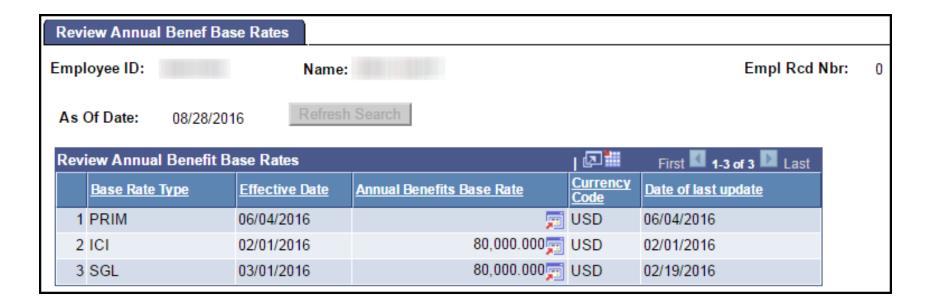- Retro Benefit Review Process (KB# 19177)

UNIVERSITY OF WISCONSIN SYSTEM
UW SERVICE CENTER

Annual Base Benefit Rate (ABBR)

KnowledgeBase #17090

UNIVERSITY OF WISCONSIN SYSTEM
SERVICE CENTER

ABBR

➢ Benefits > Employee/Dependent Information > Review ABBR

➢ Benefits > Employee/Dependent Information > Update ABBR

Review Annual Benef Base Rates

Employee ID: Name: Empl Rcd Nbr: 0

As Of Date: 08/28/2016   Refresh Search

Review Annual Benefit Base Rates   First ◀ 1-3 of 3 ▶ Last

	Base Rate Type	Effective Date	Annual Benefits Base Rate	Currency Code	Date of last update
1	PRIM	06/04/2016		USD	06/04/2016
2	ICI	02/01/2016	80,000.000	USD	02/01/2016
3	SGL	03/01/2016	80,000.000	USD	02/19/2016

UNIVERSITY OF WISCONSIN SYSTEM
SERVICE CENTER

ABBR

Create or update ICI and SGL ABBR:

- WRS new hires
- WRS rehires with more than 30 day break
- WRS transfer from another agency
- Limited to WRS
- Grad to WRS

Update ICI ABBR:

- Permanent FTE change (3 months or more)
- WRS University Staff to WRS FA/AS/LI
- WRS FA/AS/LI to WRS University Staff

Don't change ICI ABBR:

- – Salary increase or decrease with no FTE change
- – WRS FA/AS/LI to WRS FA/AS/LI
- – WRS University Staff to WRS University Staff
- – Leave of Absence

OHRWD Website:

- ICI: https://www.wisconsin.edu/ohrwd/benefits/dis/
- ICI ABBR Rules: https://www.wisconsin.edu/ohrwd/admin/download/ben/resources/iciabbr.pdf
- SGL: https://www.wisconsin.edu/ohrwd/benefits/life/sgl/

UNIVERSITY OF WISCONSIN SYSTEM
SERVICE CENTER

State Group Life (SGL) Missing or Incorrect ABBR Report

KnowledgeBase #46905

UNIVERSITY OF WISCONSIN SYSTEM
SERVICE CENTER

SGL Missing/Incorrect ABBR Report

- Identifies:
  - Employees enrolled into SGL and missing a SGL or SGL7 ABBR
  - Employees with an SGL or SG7 ABBR under $1,000.00

- Action:
  - Review and create or update ABBR value based on coverage amount submitted on State Group Life application or annual update.

UNIVERSITY OF WISCONSIN SYSTEM
SERVICE CENTER

SGL Missing/Incorrect ABBR Report

Plan Type   Find | View All   First ◄ 1 of 9 ► Last

| Plan Type: | 2M | State Group Life - Basic | | ➕ ➖ |

Coverage   Find | View All   First ◄ 1 of 1 ► Last

*Coverage Begin Date: 08/01/2016 📅 ↻   *Deduction Begin Date: 07/01/2016 📅 ↻   ➕ ➖

Coverage Election: ⦿ Elect   ○ Waive   ○ Terminate ↻   *Election Date: 08/25/2016 📅

*Enrollment Code: *Enrollment Reason:
Add Coverage ▼   Evidence of Insurability ▼   *App Received: 08/25/2016 📅

Benefit Program: US Temp F

Benefit Plan: SGLBAS 🔍 Basic   Option Code: SB1

Review Annual Benef Base Rates

| Employee ID: | | Name: | | Empl Rcd Nbr: | 0 |

As Of Date: 08/28/2016   [Refresh Search]

Review Annual Benefit Base Rates   First ◄ 1-2 of 2 ► Last

	Base Rate Type	Effective Date	Annual Benefits Base Rate	Currency Code	Date of last update
1	PRIM	07/24/2016	🔲	USD	07/24/2016
2	ICI	02/01/2016	29,000.000 🔲	USD	01/22/2016

9

UNIVERSITY OF WISCONSIN SYSTEM
SERVICE CENTER

Income Continuation Insurance (ICI) Missing or Incorrect ABBR Report

KnowledgeBase #46246

UNIVERSITY OF WISCONSIN SYSTEM
SERVICE CENTER

ICI Missing/Incorrect ABBR Report

- Identifies:
  - Employees enrolled into ICI and missing an ICI ABBR
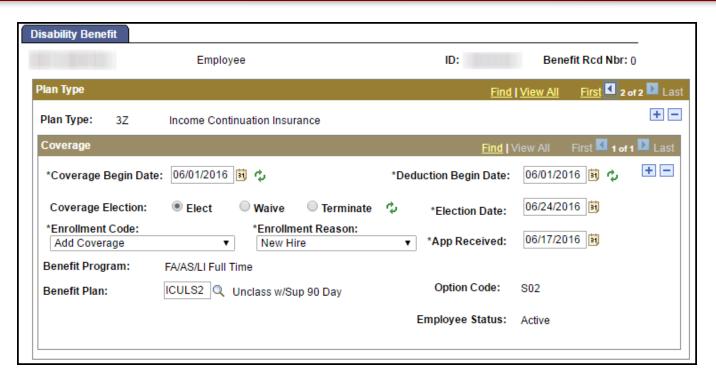 - Employees with an ICI ABBR under $1,000.00

- Action:
  - Review and create or update ABBR value
  - ICI ABBR Rules: https://www.wisconsin.edu/ohrwd/admin/download/ben/resources/iciabbr.pdf

UNIVERSITY OF WISCONSIN SYSTEM
SERVICE CENTER

Disability Benefit

[blurred]   Employee   ID: [blurred]   Benefit Rcd Nbr: 0

Plan Type   Find | View All   First ◀ 2 of 2 ▶ Last

Plan Type: 3Z   Income Continuation Insurance   ➕ ➖

Coverage   Find | View All   First ◀ 1 of 1 ▶ Last

*Coverage Begin Date: 06/01/2016 📅 ⟳   *Deduction Begin Date: 06/01/2016 📅 ⟳   ➕ ➖

Coverage Election: ⦿ Elect   ○ Waive   ○ Terminate ⟳   *Election Date: 06/24/2016 📅

*Enrollment Code: *Enrollment Reason:
Add Coverage ▼   New Hire ▼   *App Received: 06/17/2016 📅

Benefit Program: FA/AS/LI Full Time

Benefit Plan: ICULS2 🔍 Unclass w/Sup 90 Day   Option Code: S02

Employee Status: Active

Review Annual Benef Base Rates

Employee ID: [blurred]   Name: [blurred]   Empl Rcd Nbr: 0

As Of Date: 08/28/2016 📅   Refresh Search

Review Annual Benefit Base Rates   📊   First ◀ 1 of 1 ▶ Last

Base Rate Type	Effective Date	Annual Benefits Base Rate	Currency Code	Date of last update
1 PRIM	07/01/2016		🔲 USD	07/01/2016

UNIVERSITY OF WISCONSIN SYSTEM
UW SERVICE CENTER

ABBR Unrounded Report

KnowledgeBase #48479

UNIVERSITY OF WISCONSIN SYSTEM
SERVICE CENTER

- Identifies:
  - Employees with an ICI or SGL ABBR value not rounded to the nearest thousand
  - Employees with an SGL7 ABBR not rounded to the nearest five hundred

- Action:
  - Review and update the ABBR with appropriate rounded value to the nearest thousand or five hundred

UNIVERSITY OF WISCONSIN SYSTEM
SERVICE CENTER

ABBR Mismatch Report

KnowledgeBase #18118

- Identifies:
  - Employees with two or more Empl Rcds
  - ABBR value between the Empl Rcds does not match

- Action:
  - Review and update the incorrect Empl Rcd ABBR with appropriate rounded value

UNIVERSITY OF WISCONSIN SYSTEM
SERVICE CENTER

ABBR Mismatch Report

Review Annual Benef Base Rates

Employee ID: [redacted]   Name: [redacted]   **Empl Rcd Nbr:** 0

As Of Date: 08/28/2016   Refresh Search

Review Annual Benefit Base Rates   First ◀ 1-3 of 3 ▶ Last

	Base Rate Type	Effective Date	Annual Benefits Base Rate	Currency Code	Date of last update
1	PRIM	06/04/2016		USD	06/04/2016
2	ICI	02/01/2016	80,000.000	USD	02/01/2016
3	SGL	03/01/2016	80,000.000	USD	02/19/2016

Review Annual Benef Base Rates

Employee ID: [redacted]   Name: [redacted]   **Empl Rcd Nbr:** 1

As Of Date: 08/28/2016   Refresh Search

Review Annual Benefit Base Rates   First ◀ 1-3 of 3 ▶ Last

	Base Rate Type	Effective Date	Annual Benefits Base Rate	Currency Code	Date of last update
1	PRIM	06/04/2016		USD	06/04/2016
2	ICI	02/01/2016	45,000.000	USD	02/01/2016
3	SGL	03/01/2016	80,000.000	USD	02/19/2016

UNIVERSITY OF WISCONSIN SYSTEM
SERVICE CENTER

Income Continuation Insurance (ICI) Co-Elect Enrollment Report

KnowledgeBase #46903

ICI Co-Elect Enrollment Report

- Identifies:
  - Employees enrolled into both Early ICI (Plan Type 3Y) and Regular ICI (Plan Type 3Z)

- Action:
  - Create ADM event with the appropriate effective date to waive enrollment in Early ICI (Plan Type 3Y)

UNIVERSITY OF WISCONSIN SYSTEM
SERVICE CENTER

ICI Co-Elect Enrollment Report

Plan Type   Find | View All   First ◄ 1 of 2 ► Last

Plan Type: 3Y   Income Continuation - Early   [+] [−]

Coverage   Find | View All   First ◄ 1 of 1 ► Last

*Coverage Begin Date: 02/01/2016 📅 ⟳   *Deduction Begin Date: 02/01/2016 📅 ⟳   [+] [−]

Coverage Election: ⦿ Elect   ○ Waive   ○ Terminate ⟳   *Election Date: 02/11/2016 📅

*Enrollment Code: *Enrollment Reason:
Add Coverage   ▼   New Hire   ▼   *App Received: 02/11/2016 📅

Benefit Program: FA/AS/LI Full Time

Benefit Plan: ICU1E 🔍 Unclass 30 Day Early   **Option Code:**   E01

                                                     Employee Status: Active

---

Plan Type   Find | View All   First ◄ 2 of 2 ► Last

Plan Type: 3Z   Income Continuation Insurance   [+] [−]

Coverage   Find | View All   First ◄ 1 of 2 ► Last

*Coverage Begin Date: 02/01/2017 📅 ⟳   *Deduction Begin Date: 02/01/2017 📅 ⟳   [+] [−]

Coverage Election: ⦿ Elect   ○ Waive   ○ Terminate ⟳   *Election Date: 02/11/2016 📅

*Enrollment Code: *Enrollment Reason:
Add Coverage   ▼   New Hire   ▼   *App Received: 02/11/2016 📅

Benefit Program: FA/AS/LI Full Time

Benefit Plan: ICUL1 🔍 Unclass 30 Day   **Option Code:**   U01

                                               Employee Status: Active

UNIVERSITY OF WISCONSIN SYSTEM
SERVICE CENTER

Income Continuation Insurance (ICI) Missing Enrollment Report

KnowledgeBase #20826

UNIVERSITY OF WISCONSIN SYSTEM
SERVICE CENTER

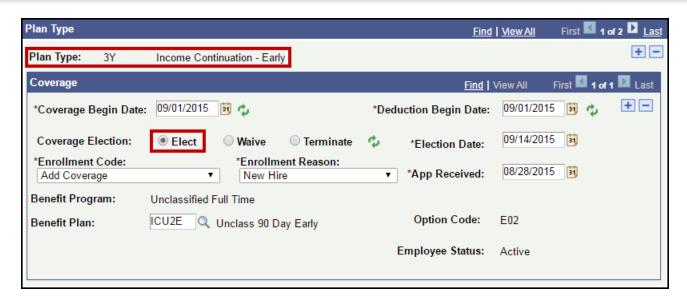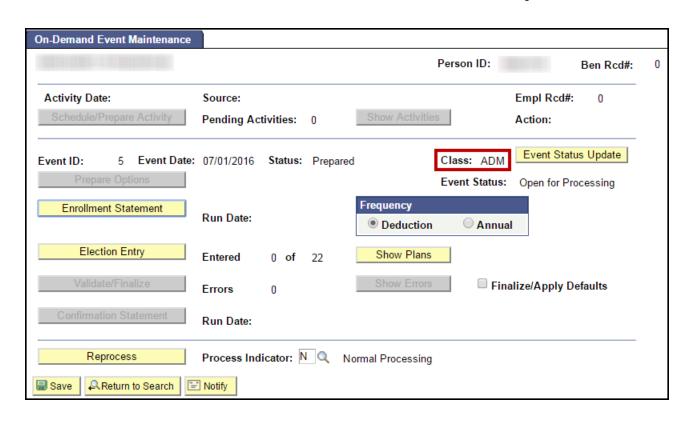# ICI Missing Enrollment Report

- Identifies:
  - Employees enrolled into Early ICI (Plan Type 3Y) with no enrollment into Regular ICI (Plan Type 3Z).

- Action:
  - Create a ADM event with the appropriate effective date to waive enrollment in Early ICI (Plan Type 3Y) and enroll into Regular ICI (Plan Type 3Z).

UNIVERSITY OF WISCONSIN SYSTEM
SERVICE CENTER

ICI Missing Enrollment Report

BAS Open Action Required Report

KnowledgeBase #16486

UNIVERSITY OF WISCONSIN SYSTEM
SERVICE CENTER

- Identifies:
  - ADM, FSA and SAV events left open.

UNIVERSITY OF WISCONSIN SYSTEM
SERVICE CENTER

BAS Action Required Report

- Action:
  – Complete the enrollment change and process to close or void if not needed.

Event Status Update — Find — First ◄ 1-8 of 8 ► Last

Sched ID Event Date	Event ID Event Class	Pgm Priority	Process Status Action Source	Eligibility Change Addr / MultiJob / Job	Disc Suppress Forms Indicator	Out of Seq	*Process Indicator *Event Status	Final
EV16	7	C02	Enrolled	☐ ☐ ☑	☐	☑	Normal Prc ▾	☐
08/01/2016	Admin	200	Manual Event		Print Conf ▾		Closed ▾	

Event Status Update — Find — First ◄ 1-46 of 46 ► Last

Sched ID Event Date	Event ID Event Class	Pgm Priority	Process Status Action Source	Eligibility Change Addr / MultiJob / Job	Disc Suppress Forms Indicator	Out of Seq	*Process Indicator *Event Status	Final
EV16	7	U02	Prepared	☐ ☐ ☑	☐	☐	Normal Prc ▾	☐
08/07/2016	Admin	200	Manual Event		Print Conf ▾		Void ▾	

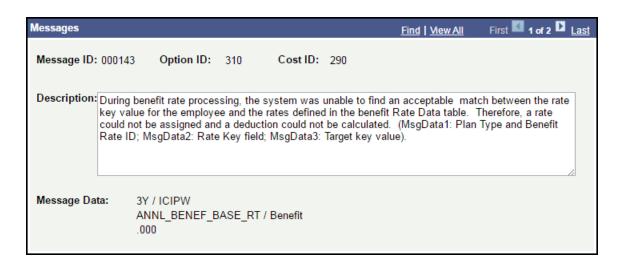UNIVERSITY OF WISCONSIN SYSTEM
SERVICE CENTER

BAS Action Required Report

- Identifies:
  - Events in Prepare Error status.

- Missing ABBR error:

- Action:
  - Review and create a ABBR value

BAS Action Required Report

- ## Future event error:

- ## Action:

  - ## – Temporarily close the future dated event

BAS Action Required Report

- Current payroll setup:
  - Monthly through June 2017
  - Biweekly through December 2017

- Future payroll setup in December 2016:
  - Monthly payroll July 2017 – June 2018
  - Biweekly payroll Jan. 2018 – Dec. 2018

UNIVERSITY OF WISCONSIN SYSTEM
UW SERVICE CENTER

Benefit Retro Queries

KnowledgeBase #20583

- Reporting Tools > Query > Query Viewer

- Old Queries:
  - UW_BN_UNCLSFD_RETRO
  - UW_BN_CLSFD_RETRO

- New Queries:
  - UW_BN_RETRO_BIWEEKLY
  - UW_BN_RETRO_MONTHLY

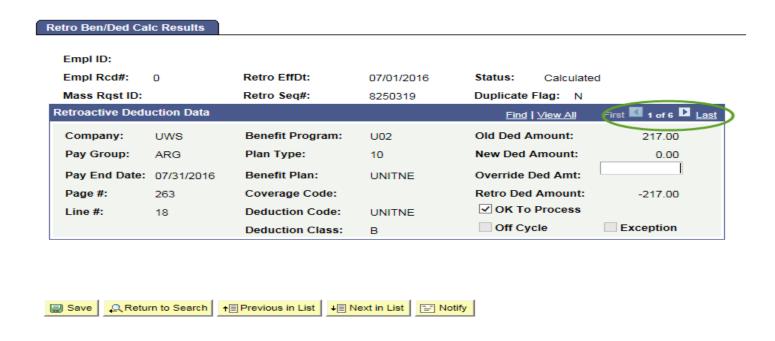UNIVERSITY OF WISCONSIN SYSTEM
SERVICE CENTER

- 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 Progrm	Coverage Code	Retro Ded Effective Date	Deducted Amount	New Deducted Amount	Deducted Amount Override	Retro Deduction Amount	Ded Class
	ARG	DOUGHERTY		0	2N	SGLSUP	U02		6/1/2016	3.96	4.23	0.00	0.27	T
	ARG	DOUGHERTY		0	14	VSP	U02	16	6/1/2016	6.54	13.08	0.00	6.54	B
	ARG	DOUGHERTY		0	2N	SGLSUP	U02		6/1/2016	3.96	4.23	0.00	0.27	T
	ARG	DOUGHERTY		0	13	DWISEL	U02	16	6/1/2016	20.52	42.19	0.00	21.67	B
	ARG	DOUGHERTY		0	10	WEAE	U02	15	6/1/2016	697.70	1733.50	0.00	1035.80	N
	ARG	DOUGHERTY		0	10	WEAE	U02	15	6/1/2016	86.00	217.00	0.00	131.00	B
	ARG	DOUGHERTY		0	14	VSP	U02	16	6/1/2016	6.54	13.08	0.00	6.54	B
	ARG	DOUGHERTY		0	13	DWISEL	U02	16	6/1/2016	20.52	42.19	0.00	21.67	B

UNIVERSITY OF WISCONSIN SYSTEM
SERVICE CENTER

Benefit Retro Review

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

Timeline

- Retro processes run every evening and available for review next day.

- Retro amounts remain in a calculated status until the next payroll.

- During a normal payroll cycle:

  – Retro amounts load on Tuesday night and will appear in Review Paycheck on Wednesday.

  – Any incorrect deductions appearing on paychecks can only be changed by the UW Service Center.

  – Any benefit retro will not calculate and load in the same evening.

UNIVERSITY OF WISCONSIN SYSTEM
SERVICE CENTER

- How Often should you review?
  - Daily is Best
- What are you looking for?
  - Validate premiums are being calculated correctly for coverage changes which 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

UNIVERSITY OF WISCONSIN SYSTEM
SERVICE CENTER

- 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.

UNIVERSITY OF WISCONSIN SYSTEM
SERVICE CENTER

References:
- Annual Base Benefit Rate (KB# 17090)
- SGL Missing/Incorrect ABBR (KB# 46905)
- ICI Missing/Incorrect ABBR (KB# 46246)
- ABBR Unrounded Report (KB# 48479)
- ABBR Mismatch (KB# 18118)
- ICI Co-Elect Enrollment Report (KB# 46903)
- ICI Missing Enrollment Report (KB# 20826)
- BAS Open Action Required Report (KB# 16486)
- Benefit Retro Queries (KB# 20583)
- Retro Benefit Review Process (KB# 19177)

OHRWD Website:

ICI: https://www.wisconsin.edu/ohrwd/benefits/dis/

ICI ABBR Rules:

https://www.wisconsin.edu/ohrwd/admin/download/ben/resources/iciabbr.pdf

SGL: https://www.wisconsin.edu/ohrwd/benefits/life/sgl/

UNIVERSITY OF WISCONSIN SYSTEM
SERVICE CENTER

Questions

UNIVERSITY OF WISCONSIN
SERVICE CENTER