UNIVERSITY OF WISCONSIN SYSTEM
SERVICE CENTER

Affinity Group 3
December 13th, 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

- UAT Update
  - Introduce Tip Sheets
  - Regional Training Schedule
- Benefits
  - FSA Overrides
  - WED Report Reminders
- SOD - New PY1 From
- CYE Review
- Institution Feedback
- December Calendar Review
- Questions
- Contact Us

UNIVERSITY OF WISCONSIN SYSTEM
SERVICE CENTER

HRS 9.2 Upgrade Project

Check-In

December 13, 2016

The University of Wisconsin Service Center will

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- ***Collaborate****…by being supportive and constructive*
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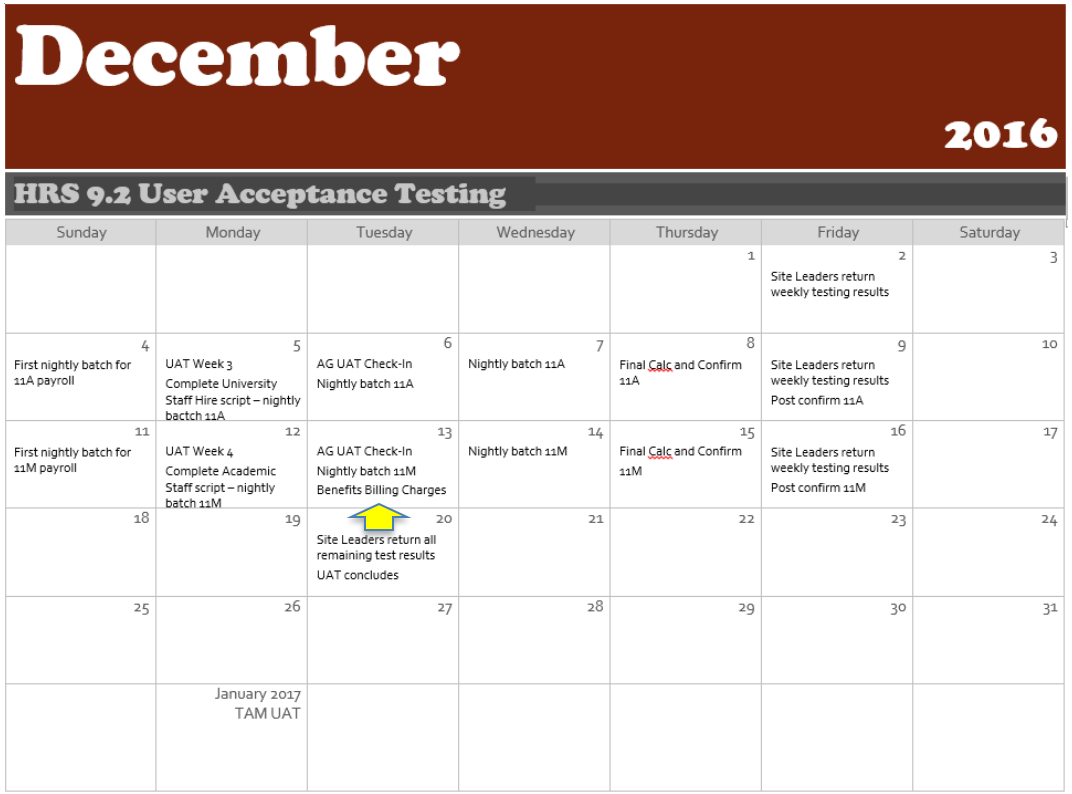
Agenda

- UAT Update
- Regional Training Schedule
- Introduce Tip Sheets
- Questions

UAT Calendar



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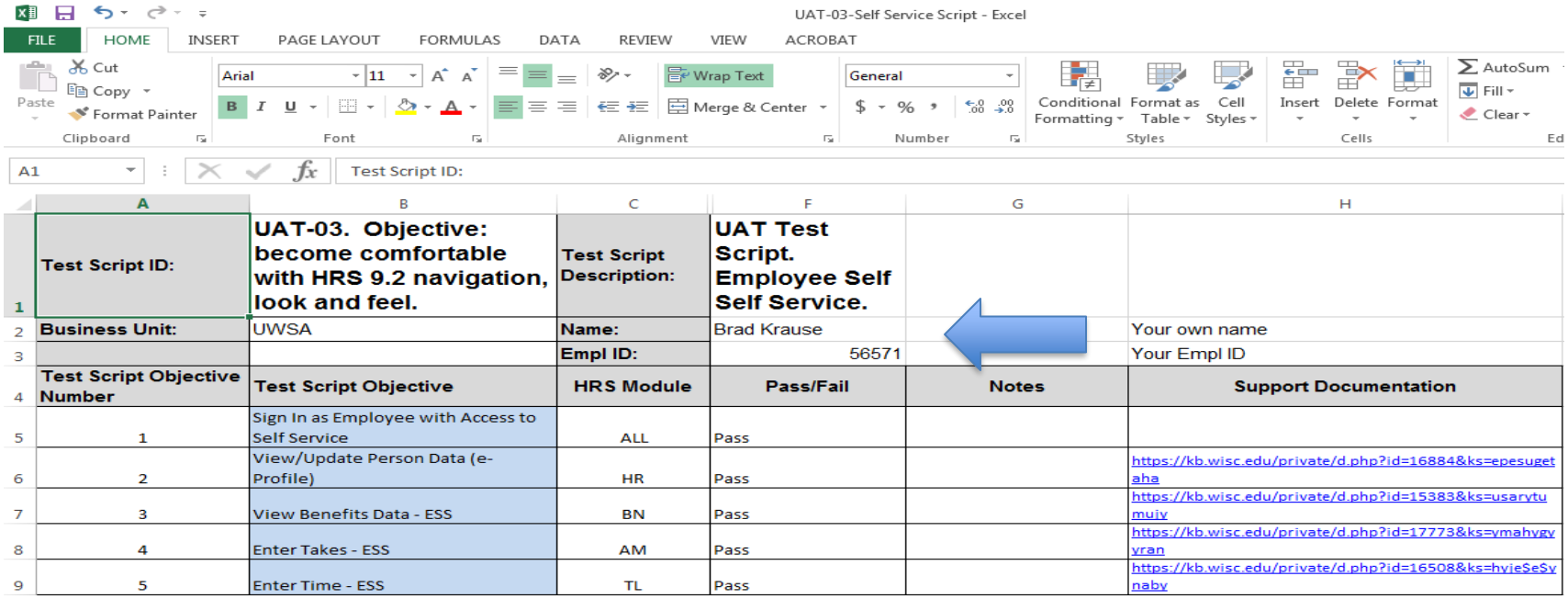
UAT Scripts

- Return completed scripts to bkrause@uwsa.edu
- Please include name and institution



	A	B	C	F	G	H
1	**Test Script ID:**	**UAT-03. Objective: become comfortable with HRS 9.2 navigation, look and feel.**	**Test Script Description:**	**UAT Test Script. Employee Self Self Service.**		
2	**Business Unit:**	UWSA	**Name:**	Brad Krause		Your own name
3			**Empl ID:**	56571		Your Empl ID
4	**Test Script Objective Number**	**Test Script Objective**	**HRS Module**	**Pass/Fail**	**Notes**	**Support Documentation**
5	1	Sign In as Employee with Access to Self Service	ALL	Pass		
6	2	View/Update Person Data (e-Profile)	HR	Pass		https://kb.wisc.edu/private/d.php?id=16884&ks=epesugetaha
7	3	View Benefits Data - ESS	BN	Pass		https://kb.wisc.edu/private/d.php?id=15383&ks=usarytumuiv
8	4	Enter Takes - ESS	AM	Pass		https://kb.wisc.edu/private/d.php?id=17773&ks=ymahvgyvran
9	5	Enter Time - ESS	TL	Pass		https://kb.wisc.edu/private/d.php?id=16508&ks=hvieSeSynaby

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Regional Training Schedule

- Weeks of February 6 and 13, 2017
- Benefits and Talent Acquisition Manager
  - Benefits 3-4 hours
  - TAM 8 hours
- Requires Training Lab for up to 15 people
- Contact bkrause@uwsa.edu

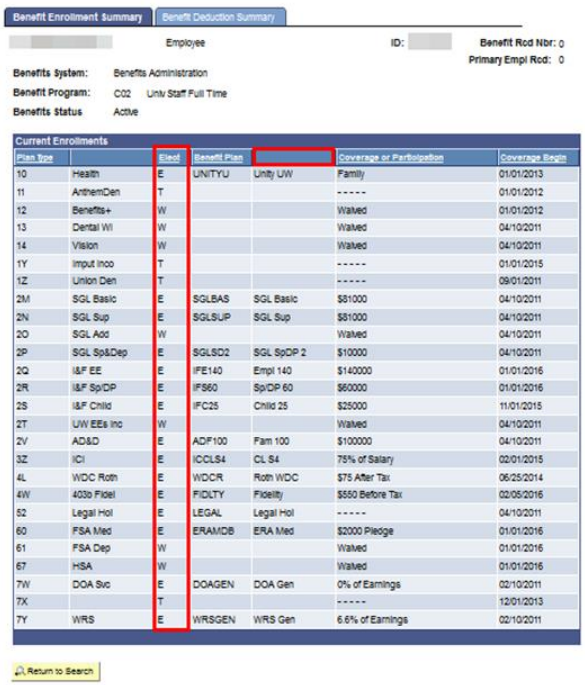
Tip Sheets

- Tips Sheets show changes from version 9.0 to 9.2
- Navigation is provided
- Screen shots provide a comparison view
- Links will be posted to the Service Center Web Site
- All modules will have Tip Sheets

BN: Benefits Summary Page

Navigation Path: Benefits →Review Employee Benefits →Current Benefits Summary (Enter Empl ID)

9.0 Screenshot



Benefit Enrollment Summary | Benefit Deduction Summary

Employee ID: Benefit Rcd Nbr: 0
Primary Empl Rcd: 0

Benefits System: Benefits Administration
Benefit Program: C02 Univ Staff Full Time
Benefits Status: Active

Current Enrollments

Plan Type		Elect	Benefit Plan		Coverage or Participation	Coverage Begin
10	Health	E	UNITYU	Unity UW	Family	01/01/2013
11	AnthemDen	T			-----	01/01/2012
12	Benefits+	W			Waived	01/01/2012
13	Dental WI	W			Waived	04/10/2011
14	Vision	W			Waived	04/10/2011
1Y	Imput Inco	T			-----	01/01/2015
1Z	Union Den	T			-----	09/01/2011
2M	SGL Basic	E	SGLBAS	SGL Basic	$81000	04/10/2011
2N	SGL Sup	E	SGLSUP	SGL Sup	$81000	04/10/2011
2O	SGL Add	W			Waived	04/10/2011
2P	SGL Sp&Dep	E	SGLSD2	SGL SpDP 2	$10000	04/10/2011
2Q	I&F EE	E	IFE140	Empl 140	$140000	01/01/2016
2R	I&F Sp/DP	E	IFS60	Sp/DP 60	$60000	01/01/2016
2S	I&F Child	E	IFC25	Child 25	$25000	11/01/2015
2T	UW EEs Inc	W			Waived	04/10/2011
2V	AD&D	E	ADF100	Fam 100	$100000	04/10/2011
3Z	ICI	E	ICCLS4	CL S4	75% of Salary	02/01/2015
4L	WDC Roth	E	WDCR	Roth WDC	$75 After Tax	06/25/2014
4W	403b Fidel	E	FIDLTY	Fidelity	$550 Before Tax	02/05/2016
52	Legal Hol	E	LEGAL	Legal Hol	-----	04/10/2011
60	FSA Med	E	ERAMDB	ERA Med	$2000 Pledge	01/01/2016
61	FSA Dep	W			Waived	01/01/2016
67	HSA	W			Waived	01/01/2016
7W	DOA Svc	E	DOAGEN	DOA Gen	0% of Earnings	02/10/2011
7X		T			-----	12/01/2013
7Y	WRS	E	WRSGEN	WRS Gen	6.6% of Earnings	02/10/2011

Return to Search

9.2 Screenshot

Favorites | Main Menu | > Benefits > Review Employee Benefits > Current Benefits Summary

Benefit Enrollment Summary | Benefit Deduction Summary

Employee ID: Benefit Record Number 0
Primary Empl Record 0

Benefits System Benefits Administration
Benefit Program C02 Univ Staff Full Time
Benefits Status Active

Current Enrollments

Plan Type	Coverage Election	Benefit Plan	Description	Coverage or Participation	Coverage Begin
State Group Health	Elect	UNITYU	Unity UW	Family	01/01/2013
Anthem DentalBlue Dental	Terminate			-----	01/01/2012
EPIC Benefits+	Waive			Waived	01/01/2012
Dental Wisconsin	Waive			Waived	04/10/2011
VSP Vision Insurance	Waive			Waived	04/10/2011
Imputed Income	Terminate			-----	01/01/2015
Union Dental	Terminate			-----	09/01/2011
State Group Life - Basic	Elect	SGLBAS	SGL Basic	$81000	04/10/2011
State Group Life-Supplemental	Elect	SGLSUP	SGL Sup	$81000	04/10/2011
State Group Life - Additional	Waive			Waived	04/10/2011
State Group Life - Sp/DP & Dep	Elect	SGLSD2	SGL SpDP 2	$10000	04/10/2011
Ind & Fam Life - Employee	Elect	IFE140	Empl 140	$140000	01/01/2016
AD&D	Elect	ADF100	Fam 100	$100000	04/10/2011
Income Continuation Insurance	Elect	ICCLS4	CL S4	75% of Salary	02/01/2015
Roth WI Deferred Comp	Elect	WDCR	Roth WDC	$75 After Tax	06/25/2014
403(b) Fidelity	Elect	FIDLTY	Fidelity	$550 Before Tax	02/05/2016
Legal Holiday	Elect	LEGAL	Legal Hol	-----	04/10/2011
FSA Medical	Elect	ERAMDB	ERA Med	$2000 Pledge	01/01/2016
FSA Dependent Care	Waive			Waived	01/01/2016
Health Savings Account	Waive			Waived	01/01/2016
DOA Prior Service	Elect	DOAGEN	DOA Gen	0% of Earnings	02/10/2011
	Terminate			-----	12/01/2013
Wisconsin Retirement System	Elect	WRSGEN	WRS Gen	6.6% of Earnings	02/10/2011

Return to Search

- In 9.0, only the Election Code of E, W, or T appeared in the Coverage Election column. In 9.2 the full description of Election Terminate, or Waive will appear.
- The column header containing the long Description of the Benefit Plan is missing in 9.0. In 9.2 it is displayed.

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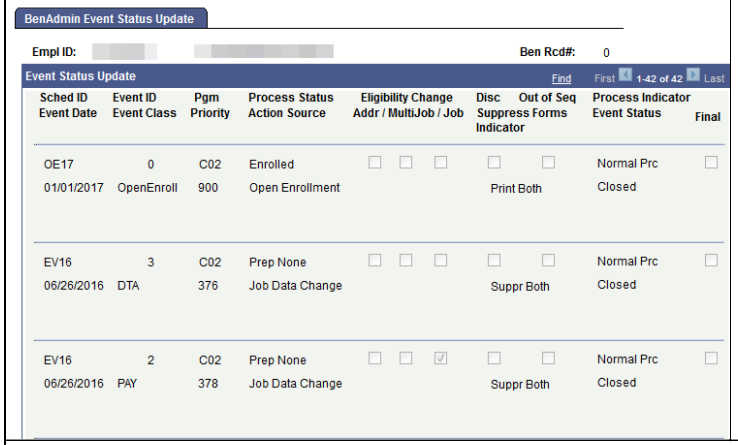
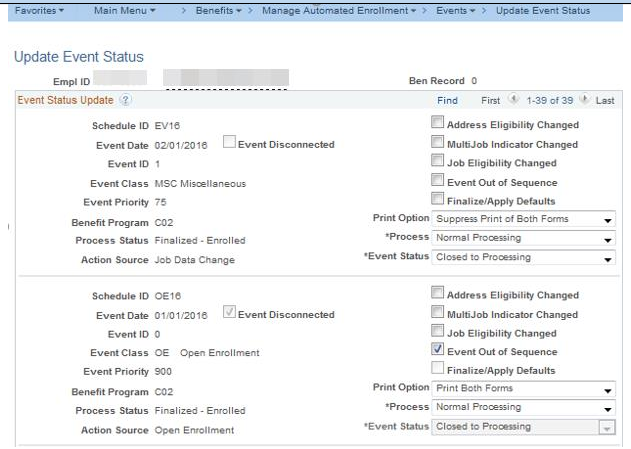
BN: On Demand Event Maintenance: Event Status Update Page

Navigation Path: **Benefits → Manage Automated Enrollment → Events → On Demand Event Maintenance (Enter Empl ID) → Event Status Update**

9.0 Screenshot	9.2 Screenshot





- The layout of the page embeds the column headers from 9.0 into each Event for 9.2 rather than appear as two rows along the top. This helps better define what each piece of information means within an Event.
- All functionality for On Demand Event Maintenance and the Update Event Status screens remains the same in 9.2 for Processing, Reprocessing, Deleting, and Voiding Events.

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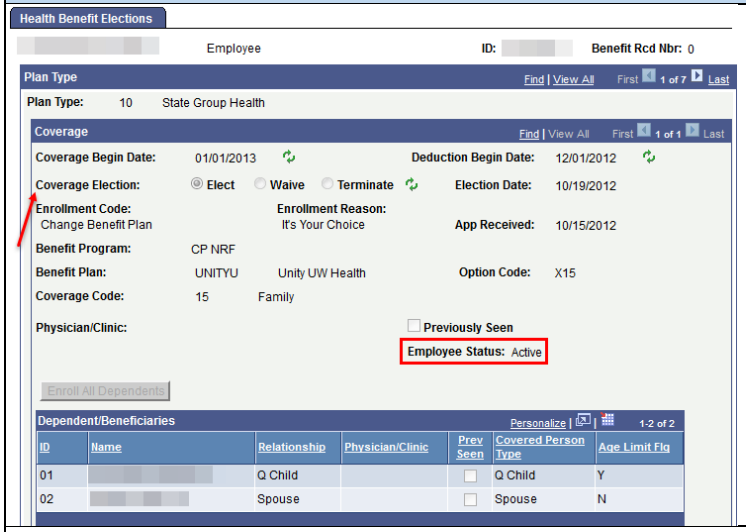
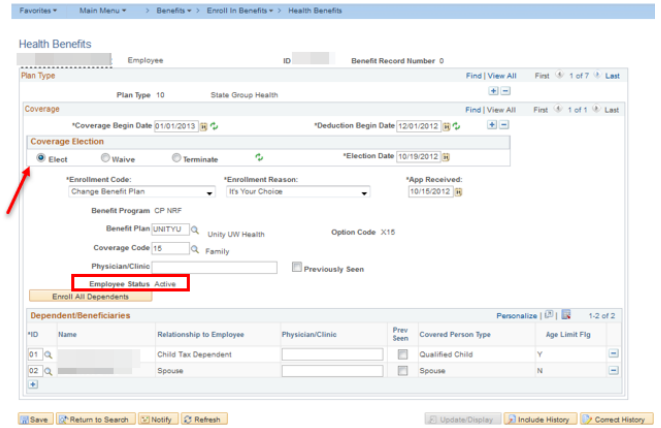
BN: Base Benefits: Health Benefits

Navigation Path: Benefits → Enroll in Benefits → Health Benefit (Enter Empl ID)

9.0 Screenshot	9.2 Screenshot
	

- In 9.0, the Coverage Election Fields are part of the Coverage box. In 9.2, a subsection box around the Coverage Election Fields separate this information from the rest of the Coverage box.
- The Employee Status field located on the right side of the screen in 9.0 below the Previously Seen button, will be located on the left side o the screen below the Physician/Clinic field in 9.2.

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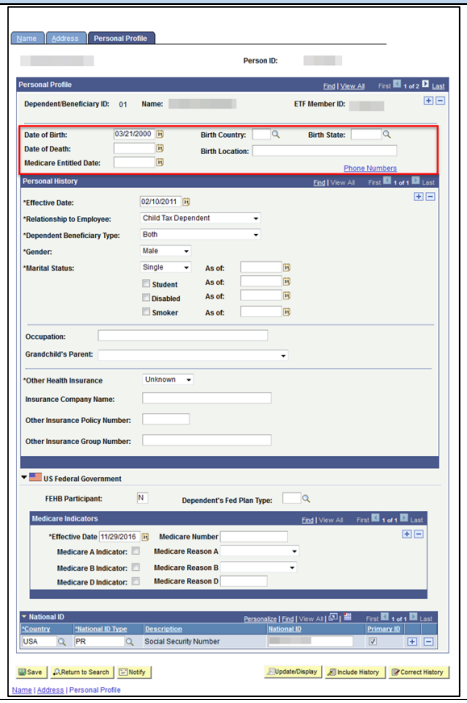
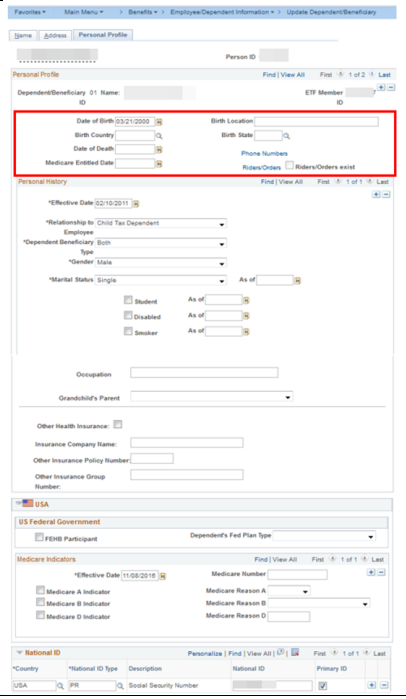
BN: Update Dependent Beneficiary Page

Navigation Path: Benefits →Employee/Dependent Information → Update Dependent/Beneficiary (Enter Empl ID)

9.0 Screenshot	9.2 Screenshot
	

- In 9.0 there were 3 columns of data for the dependent information located above the Personal History section In 9.2, the locations of a few data fields have been adjusted to accommodate 2 columns of data.
- 9.2 will have a Riders/Orders button that does not exist in 9.0.

UNIVERSITY OF WISCONSIN SYSTEM SERVICE CENTER

Questions

FSA Overrides

! 1/1/2017 and Forward

- Employee contributions will be deducted in equal amounts from each paycheck, pre-tax, through the Plan Year.
  - Employees must follow the 26, 12, 9-pay schedules
  - UWSC Benefits Team will be querying for overrides that are placed on employee Spending Accounts and will remove any that are not allowed
  - Only 9-pay employees will have overrides on their accounts
- Employees may **not** have overrides placed on their FSA accounts UNLESS it is their final paycheck prior to retirement/termination.

Benefit WED Reports

The following reports need to be worked to ensure Benefit Plan enrollment or coverage has been updated for correct deductions.

- UW_BN_AGE_70
- UW_BN_ICI_COELECT
- UW_BN_ICI_MISSING_ENROLLMENT
- UW_BN_ABBR_MISMATCH
- UW_BN_ABBR_UNROUNDED
- UW_BN_ICI_ABBR
- UW_BN_SGL_ABBR

Benefit WED Reports

The reports listed below need to be worked to ensure benefit events are processed timely and correctly. In addition, it will ensure enrollment opportunities are given to employees or enrollments are confirmed.

- UW_HR_NEW_HIRE_HOLD
- UW_BN_EPENDING
- UW_BN_BAS_OPEN_ACTN_REQ
- UW_BN_PRIMARY_FLAG_ASSIGNED_CAMPUS

Questions

PY1 Compensating Control Log

The PY1 Compensating Control Log form is completed by campuses on a weekly basis.

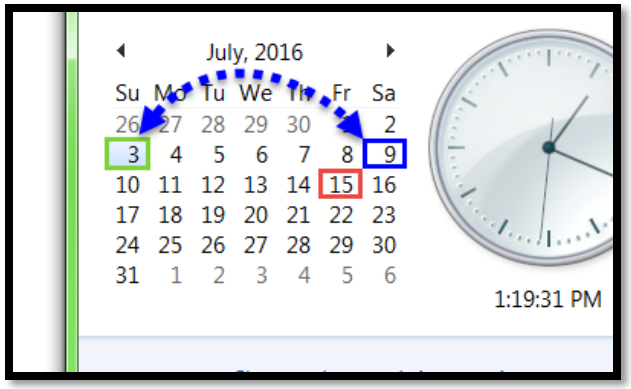
A recently modified version of the form can be found here - https://uwservice.wisconsin.edu/docs/publications/sod-comp-control-log-py1.pdf

Things to remember

-The start date will always be a Sunday

-The end date will always be the following Saturday

-The due date is the following Friday



New PY1 Compensating Control Log Form

PY1 HRS DUTIES COMPENSATING CONTROL LOG

Review Period Start Date	Review Period End Date	Reviewed Paycheck Chain of Custody Register – *Note Payroll Date, ID, On/Off Cycle*	Discrepancies & Actions Taken	Printed Name and Signature	Date of Signature
12/11/2016	12/17/2016	If discrepancies have been found, note the information above related to the discrepancy. If no discrepancies are found, leave this column blank.	If Discrepancies have been found, enter the actions taken to resolve. If no discrepancies are found, indicate *"no discrepancies found for review period."*	Type your name	Date Signed

Sunday

Saturday

Printed Name and Signature required

Enter date of signature

Questions

CYE – Important Dates

Important Calendar Year-End Payroll Dates - 2016-2017	as of November 18, 2016
Date	**Event**
12/01/2016	Last on-cycle pay date in 2016 for monthly paid staff
12/16/2016	Check Correction deadline to guarantee employees' original W-2s reflect the correct amounts
12/22/2016	Last on-cycle pay date in 2016 for bi-weekly paid staff
12/28/2016	**NOON** – Deadline for Missed Payroll submissions for inclusion on 2016 W-2s
12/29/2016	Last off-cycle check date for 2016 (bi-weekly and monthly paid staff)
12/30/2016	**11:00AM!** Deadline for Foreign National Personal Data Changes in Glacier (related to 1042-S 2016)
01/06/2017	Final deadline for last minute Check Correction adjustments on an employee's W-2 (not guaranteed, based on volume)
01/06/2017	Deadline for Taxable Fringe Adjustments for calendar year 2016
01/06/2017	Deadline for Guaranteed Personal Data Changes (for ACA and W2 data)
01/23/2017	Targeted date for finish printing W2s
02/14/2017	Targeted print date for 2016 Fellowship/Scholarship Letters
01/30/2017	Targeted date for employees to receive 2016 W-2s
01/31/2017	IRS postmark deadline for employees 2016 W-2s
02/23/2017	Targeted print date for 2016 1042-S forms - subject to change due to the HRS Upgrade
03/01/2017	CYE posts to WISDM (approximately)
03/10/2017	Targeted date for employees to receive 2016 1042-S forms (3/15/17 due)

Institution Feedback

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

Calendar Review – December 2016

Today | 12A | 12B | 12M

December 2016

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

Contact Us

Contact your Affinity Group via Telephone, Email, Web Forms our Chat

Visit our support page at https://kb.wisc.edu/hrs/page.php?id=17960

AG Support phone numbers	AG Support email addresses	LiveChat & Webforms
7:45 a.m. - 4:30 p.m 5 days a week (Mon-Fri) AG1: (888) 298-0141 (toll free) or (608) 262-0600 AG2: (888) 298-0151(toll free) or (608) 262-0419 AG3: (888) 298-4159 (toll free) or (608) 262-6093	7:45 a.m. - 4:30 p.m 5 days a week (Mon-Fri) AG1: ag1@uwsa.edu AG2: ag2@uwsa.edu AG3: ag3@uwsa.edu	7:45 a.m. - 4:30 p.m 5 days a week (Mon-Fri) Click here to chat with a support agent Use our web from to submit an incident

Support Request - Emails

- **Please include in the subject line of your email the following:**
  - EE Name – Employee ID/Empl Rcd – Description

  - *Example:*
    Email Subject: Buckingham B Badger – 01234567 Rcd 0 – Benefits Inquiry Description