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

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SERVICE CENTER

HRS 9.2 Upgrade Project Check-In December 13, 2016

The University of Wisconsin Service Center will

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 - Act with Integrity...always and in all matters

Agenda

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



UAT Calendar

December

2016

HRS 9.2 User Acceptance Testing

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
				1	2 Site Leaders return weekly testing results	3
4 First nightly batch for 11A payroll	5 UAT Week 3 Complete University Staff Hire script – nightly bactch 11A	6 AG UAT Check-In Nightly batch 11A	7 Nightly batch 11A	8 Final <u>Calc</u> and Confirm 11A	9 Site Leaders return weekly testing results Post confirm 11A	10
11 First nightly batch for 11M payroll	12 UAT Week 4 Complete Academic Staff script – nightly batch 11M	13 AG UAT Check-In Nightly batch 11M Benefits Billing Charges	14 Nightly batch 11M	15 Final <u>Calc</u> and Confirm 11M	16 Site Leaders return weekly testing results Post confirm 11M	17
18	19	20 Site Leaders return all remaining test results UAT concludes	21	22	23	24
25	26	27	28	29	30	31
	January 2017 TAM UAT					



UAT Scripts

- Return completed scripts to <u>bkrause@uwsa.edu</u>
- Please include name and institution

				UAT-03	3-Self Service Sc	ript - Excel			
FILE HOME INS	ERT PAGE LAYOUT	FORMULAS DAT	A REVIEW VIEW A	ACROBA	AT				
Paste Format Painter	Arial • 11 B I U •		Image: System Image: System Image: System Image: System Image: System Image: System	er 🔻	General \$ - % >	▼ €.0 .00 .00 →.0	Conditional Format as Cell Formatting * Table * Styles	Insert Delete Format	∑ AutoSum ↓ Fill →
Clipboard 🗔	Font	r <u>s</u>	Alignment	E.	Number	E.	Styles	Cells	Ed

_			4.	
	\sim	\sim	Jx	Test Script ID:

	Α	В	С	F	G	Н
1	Test Script ID:		Test Script Description:	UAT Test Script. Employee Self Self Service.		
2	Business Unit:	UWSA	Name:	Brad Krause		Your own name
з			Empl ID:	56571		Your Empl ID
4	Test Script Objective Number	Test Script Objective	HRS Module	Pass/Fail	Notes	Support Documentation
		Sign In as Employee with Access to				
5	1	Self Service	ALL	Pass		
		View/Update Person Data (e-				https://kb.wisc.edu/private/d.php?id=16884&ks=epesuget
6	2	Profile)	HR	Pass		aha
7	3	View Benefits Data - ESS	BN	Pass		https://kb.wisc.edu/private/d.php?id=15383&ks=usarytu muiy
8	4	Enter Takes - ESS	АМ	Pass		https://kb.wisc.edu/private/d.php?id=17773&ks=ymahygy yran
9	5	Enter Time - ESS	TL	Pass		https://kb.wisc.edu/private/d.php?id=16508&ks=hyjeSeSy naby



A1

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 <u>bkrause@uwsa.edu</u>



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



9.0 Screenshot						9.2 Screenshot						
nafit Fr	nroliment Summar		rit Deduction S	ummary			Favorites * Main Menu *	> Benefits * >	Review Employ	ee Benefits * > C	urrent Benefits Summary	r.
			ployee		ID:	Benefit Rod Nbr: 0	Benefit Enrollment Summary	Benefit Deduction S	lummary			
-		-			10.	Primary Empl Rod: 0		Employee		10	Benefit Record h	lumber 0
metits s	System: Benefit	ts Adminis	tration							10	Primary Empl Recor	
enefit Pr	100 CT-	Univ Sta	Full Time					lenefits Administration				
ments s	Status Active						Benefit Program (Benefits Status A	202 Univ Staff Full Tim				
urrent E	Enrollments	_						1900.0				
ian Type		Elect	Benefit Plan		Coverage or Participation	Coverage Begin	Current Enrollments		Benefit		Coverage or	
0	Health	ε	UNITYU	Unity UW	Family	01/01/2013	Plan Type	Coverage Election	Plan	Description	Participation	Coverage Begin
	AnthemDen	T				01/01/2012	State Group Health	Elect	UNITYU	Unity UW	Family	01/01/2013
2 3	Benefits+	W			Walved	01/01/2012 04/10/2011	Anthem DentalBlue Dental	Terminate				01/01/2012
4	Dental WI Vision	W.			Walved	04/10/2011	EPIC Benefits+	Waive			Waived	01/01/2012
r Y	Imput Inco	T	-		FIERED	01/01/2015	Dental Wisconsin	Waive			Waived	04/10/2011
z	Union Den	T	-			09/01/2011	VSP Vision Insurance	Walve			Waived	04/10/2011
м	SGL Basic	E	SGLBAS	SGL Basic	\$81000	04/10/2011	Imputed Income	Terminate			****	01/01/2015
N	SGL Sup	ε	SGLSUP	SGL Sup	\$81000	04/10/2011	Union Dental	Terminate				09/01/2011
0	SGL Add	w	ADDITION OF THE	100000	Walved	04/10/2011	State Group Life - Basic	Elect	SGLBAS	SGL Basic	\$81000	04/10/2011
p	SGL Sp&Dep	ε	SGLSD2	SGL SpDP 2	\$10000	04/10/2011	State Group Life-Supplemental	Elect	SGLSUP	SGL Sup	581000	04/10/2011
2	I&F EE	ε	IFE140	Empl 140	\$140000	01/01/2016					1220	
R	I&F SpiDP	Ε	IFS60	Sp/DP 60	\$60000	01/01/2016	State Group Life - Additional	Waive			Waived	04/10/2011
5	I&F Child	E	IFC25	Cinild 25	\$25000	11/01/2015	State Group Life - Sp/DP & Dep	Elect	SGLSD2	SGL SpDP 2	\$10000	04/10/2011
т	UW EEs Inc	W			Walved	04/10/2011	Ind & Fam Life - Employee	Elect	IFE140	Empl 140	\$140000	01/01/2016
v -	AD&D	E	ADF100	Fam 100	\$100000	04/10/2011	AD40	Elect	ADE100	Fam 100	\$100000	04/10/2011
z	ICI WDC Rath	-	ICCLS4 WDCR	CL S4 Roth WDC	75% of Salary \$75 After Tax	02/01/2015 06/25/2014						
N	403b Fidel	F	FIDLTY	Fidelity	\$75 After Tax \$550 Before Tax	05/25/2014 02/05/2016	Income Continuation Insurance	Elect	ICCL54	CL S4	75% of Salary	02/01/2015
2	Legal Hol	E	LEGAL	Legal Hol		04/10/2011	Roth WI Deferred Comp	Elect	WDCR	Roth WDC	\$75 After Tax	06/25/2014
	FSA Med	E	ERAMDB	ERA Med	\$2000 Pledge	01/01/2016	403(b) Fidelity	Elect	FIDLTY	Fidelity	\$550 Before Tax	02/05/2016
i)	FSA Dep	W			Walved	01/01/2016	Legal Holiday	Elect	LEGAL	Legal Hol		04/10/2011
6	HSA	W			Walved	01/01/2016	FSA Medical	Elect	ERAMOB	ERA Med	\$2000 Pledge	01/01/2016
N	DOA Svc	E	DOAGEN	DOA Gen	0% of Earnings	02/10/2011	FSA Dependent Care	Waive			Waived	01/01/2016
¢		т				12/01/2013	Health Savings Account	Waive			Waived	01/01/2016
6	WRS	E	WRSGEN	WRS Gen	6.6% of Earnings	02/10/2011	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

- 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, o 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.



BN: On Demand Event Maintenance: Event Status Update Page

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

9.0 Screenshot	9.2 Screenshot				
BenAdmin Event Status Update	Favorites * Main Menu * > Benefits * > Manage Automated Enrollment * > Events * > Update Event Status				
EmpiliD: Ben Rcd#: 0	Update Event Status				
Event Status Update Find First 💶 1-42 of 42 💵	Empl ID Ben Record 0				
Sched ID Event ID Pgm Process Status Eligibility Change Disc Out of Seq Process Indicator	Event Status Update 12 Find Find Find Find Find Find Find Find Last inal Schedule ID EV16 Image: Address Eligibility Changed Image: Address Eligibility Changed				
OE17 0 C02 Enrolled I Normal Prc 01/01/2017 OpenEnroll 900 Open Enrollment Print Both Closed	Event ID 1 Job Eligibility Changed Event Class MSC Miscellaneous Event Out of Sequence Event Priority 75 FinalizeApply Defaults Benefit Program C02 Print Option Supress Print of Both Forms Process Status Finalized - Enrolled *Process Normal Processing				
EV16 3 C02 Prep None I Normal Prc 06/26/2016 DTA 376 Job Data Change Suppr Both Closed	Action Source Job Data Change "Event Status Closed to Processing Schedule ID OE10 Address Eligibility Changed Event Date 01/01/2016 Event Disconnected MultiJob Indicator Changed Event ID 0 Job Eligibility Changed Event ID 0 Job Eligibility Changed				
EV16 2 C02 Prep None Image: Constraint of the const	Event Priority 300 Finalize/Apply Defaults Event Priority 300 Print Option Print Both Forms Process Status Finalized - Enrolled *Process Normal Processing Action Source Open Enrollment *Event Status Closed to Processing				
helps better define what each piece of information means within	o each Event for 9.2 rather than appear as two rows along the top. This an Event. Jate Event Status screens remains the same in 9.2 for Processing,				



BN: Base Benefits: Health Benefits

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

9.0 Screenshot	9.2 Screenshot
Health Benefit Elections	Favorites * Main Menu * > Benefits *> Enotil In Benefits *> Health Benefits
Employee ID: Benefit Rcd Nbr: 0	Health Benefits
Plan Type Find View A8 First III 1 of 7 Last Plan Type: 10 State Group Health 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	Employee 10 Benefit Record Number 0 Pain Type Priod (Verv All Priod (* 1 of 7 * Last Pain Type 10 Strate Grand MultiM
Coverage <u>Find</u> View All First II 1 of 1 ID Last	Files Type 10 State Group Health Image: State Group Health Coverage Files (% 1 of 1 %): Lest "Coverage Begin Date [101(2013) [§ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$
Coverage Begin Date: 01/01/2013 0 Deduction Begin Date: 12/01/2012 0 Coverage Election: Image Election: Image Election: Image Election: Election Date: 10/19/2012 Frontiment Code: Enrollment Reason: Image Election: Image Election: 10/15/2012 Benefit Plan: If Your Choice App Received: 10/15/2012 Benefit Plan: UNITYU Unity UW Health Option Code: X15 Coverage Code: 15 Family Family Family	Coverage Election
Physician/Clinic: Previously Seen Employee Status: Active Enroll Al Dependents	DependentSeneficiaries Personalize (12) Item Relationship to Employee Physician/Clinic Person Type Age Limit Fig 01 0_ Onlid Tax Dependent Ovalified Child V Ovalified Child <t< td=""></t<>
Dependent/Beneficiaries Personalize [5] # 1.2 or 2 ID Name Relationship Physician/Clinic Prev Seen Type Age Limit Flg 01 O Child O Child O Child Y 02 Spouse Spouse No	(2 Base (2 Refue to Search (2) Notice Helloy (2 Refere)
this information from the rest of the Coverage box.	In 9.2, a subsection box around the Coverage Election Fields separate 9.0 below the Previously Seen button, will be located on the left side of



	ate Dependent/Beneficiary (Enter Empl ID)
9.0 Screenshot	9.2 Screenshot
Basma Address Personal Profile	Favorites * Main Manu * > Benefix * > Employee/Dependent Information * > Update DependentBenefictary Users
Person ID:	Person ID
Personal Profile End Vanx Ad Friet 🖬 1 at 2 🗖 Last	Personal Profile Find View All Find View A
Dependent Beneficiary ID: 01 Name: ETF Member ID:	Dependent/Deneficiary 01 Name: ETF Member
	Date of Birth [03/21/2000] Birth Location
Date of Birth: 03212000 B Birth Country: Q Birth State: Q Date of Death: Birth Location:	Birth Country Q, Birth State Q,
Medicare Entitied Date:	Date of Death B Phone Numbers Medicare Entitled Date B Riders/Orders exist
Personal History End View Al First III 1 of 1 III Last	Personal History Find View All Find With All Find W Last
*Effective Date: 02/10/2011 🕫 🖝	*Effective Date (02102011)
*Relationship to Employee: Child Tax Dependent - *Denendent Reneficiany Type: Both -	*Relationship to Child Tax Dependent
"Gender: Male	*Dependent Beneficiary (Both
*Marital Status: Single - As of:	"Gender Mate
Student As of:	*Marital Status Single As of B
Smoker As of:	Student As of 8
Occupation:	Smoker As of B
Grandchild's Parent:	
*Other Health Insurance Unknown •	Occupation
Insurance Company Name:	Grandchild's Parent
Other Insurance Policy Number:	
Other Insurance Group Number:	Other Health Insurance:
	Insurance Company name: Other Insurance Policy Number
▼ 📕 US Federal Government	Other Insurance Group
FEHB Participant: N Dependent's Fed Plan Type: Q	winner:
Medicate Indicators End View At First III + of + III Last	US Federal Government
*Effective Date 11/29/2016 Medicare Number	E FEHB Participant Dependent's Fed Plan Type -
Medicare B Indicator: Medicare Reason B	Medicare Indicators Find View All Find (* 1 of 1 (* 1 and
Medicare D Indicator: 📃 Medicare Reason D	*Effective Date [11:04:0215] Medicare Rumber Medicare A Indicator Medicare A Indicator
v Holessin	Medicare B Indicator Medicare Reason B
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USA Q PR Q Social Security Number	✓ National ID Personalize Find View All Ø1 Find (0) 1 of 1 (0) Last
Bare ARturn to Search Ellotty Ellopdate/Display Ellopdate/Display Ellopdate/Display	Country *National ID Type Description National ID Presonalize Init View All View
Name Address Personal Profile	USA Q, PR Q, Social Security Number



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





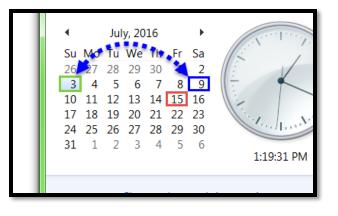
PY1 Compensating Control Log

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-compcontrol-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 – <i>Note Payroll</i> <i>Date, ID, On/Off Cycle</i>	Discrepancies & Actions Taken	Printed Name and Signature	Date of Signature
12/11/2016 Sunday	12/17/2016 Saturday	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 Printed Name and Signature required	Date Signed

Questions





CYE – Important Dates

Important Ca	alendar 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

G	Foday		December 2016	12A 12B	12M	Ð
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	12 [12A] 2nd Batch	13 [12A] Payroll and	14 [12A] 4th Batch	15 [12A] Final Calc	16 [12M] 1st Batch	17
Begin [12A] 1st Batch Prelim Calc	Prelim Calc	Benefit Retro and Payline Load [12A] 3rd Batch Prelim Calc	Prelim Calc [12A] FICA Deadline	[12A] Confirmation Deadline (Eve)	Prelim Calc	
18	19	20	21	22	23	24
[12M] 2nd Batch Prelim Calc	[12M] 3rd Batch Prelim Calc	[12M] 4th Batch Prelim Calc	[12M] 5th Batch Prelim Calc	[12A] Pay Date [12M] Final Calc	[12B] 1st Batch Prelim Calc	[12B] Pay Period End
		[12M] Payroll and Benefit Retro and Payline Load	[12M] FICA Deadline	[12M] [12M] Confirmation Deadline (Eve)		Christmas Eve
25	26	27	28	29	30	31
[1A] Pay Period Begin	[12B] 2nd Batch Prelim Calc Christmas Day (Observed)	[12B] Payroll and Benefit Retro and Payline Load [12B] 3rd Batch Prelim Calc	[12B] FICA Deadline [12B] 4th Batch Prelim Calc	[12B] Final Calc [12B] Confirmation Deadline (Mor)		[12M] Pay Period End New Year's Eve

SERVICE CENTER

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

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AG Support email addresses	LiveChat & Webforms
7:45 a.m 4:30 p.m 5 days a week (Mon-Fri)	7:45 a.m 4:30 p.m 5 days a week (Mon-Fri)
AG1: ag1@uwsa.edu	Click here to chat with a support agent
AG2: ag2@uwsa.edu	Use our web from to submit an incident
AG3: ag3@uwsa.edu	
	7:45 a.m 4:30 p.m 5 days a week (Mon-Fri) AG1: <u>ag1@uwsa.edu</u> AG2: <u>ag2@uwsa.edu</u>

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