



Affinity Groups

October 17, 2017

- 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

- HRS 9.2 Maintenance & New Functionality
- Portal Confirmation Statements
- COBRA
- Nonstandard Processing Schedule
- PY Calendar Review
- Institutional Feedback

HRS 9.2 Maintenance & New Functionality

- PUM (PeopleSoft Update Manager): Oracle releases updates five times a year
- Post-upgrade, commitment to keep HRS updated
- Opportunity to introduce new functionality
- Legal Holiday Auto-load: first through the gate
 - Implemented with 9/24 bundle
- Next release of new functionality: November 5, 2017

New Functionality via PUM - November 2017

- Paycheck Modeler for Payroll Coordinators
 - More accurate projections for employee's paychecks when making benefit, tax and other changes
- Print View Feature (TAM Users)
 - Provides the ability to selectively print the application sections along with questionnaire and attachments
- Absence Edit/Cancelation
 - Allows employees to cancel their requested absence
- Improved Interface ('Fluid')
 - More user-friendly interface for employees to view personal information and benefits summary
- More information here: <https://uwservice.wisconsin.edu/hrs/project-readiness#3-tab>

Next Steps

- HRS 9.2 Maintenance all AG Workshop:
 - November 2nd @ 1-2:30pm
 - Demonstration/overview of changes
 - Review supporting resources
 - Administrators will get emailed before and after implementation
 - Portal articles will be posted for employee facing functionality

Portal – Confirmation Statements

- Benefits Portal
- Contains Three Tabs:
 - Summary, Statements & Dependents
- To find 2018 ABE Confirmation Statements
 - Click on the Statements Tab
 - Statement column displays statements in year and then alpha order.
 - This is the default order when an employee goes into the portal.
 - To change sort order to get most recent statement on the top:
click on Year column
 - » first click sorts it oldest to newest
 - » second click sorts it newest to oldest



Portal – Confirmation Statements

Statements tab as it appears when Benefits Portal page is opened

The screenshot shows the MyUW Benefits Information portal. At the top, there is a search bar and a navigation menu with the following items: Summary, Statements (highlighted with a red box), and Dependents. Below the navigation menu is a table with the following data:

Year	Statement
2016	2017 Benefit Enrollment Confirmation Issued Nov 09, 2016
2016	2017 Benefit Enrollment Confirmation Issued Nov 11, 2016
2016	2017 Benefit Enrollment Confirmation Issued Nov 22, 2016
2017	2018 Benefit Enrollment Confirmation Issued Oct 04, 2017
2017	2018 Benefit Enrollment Confirmation Issued Oct 04, 2017
2016	Benefit Enrollment Confirmation New Hires Issued Aug 24, 2016
2016	ETF Annual Statement of Benefits (WRS) Issued 2017

Below the table, there is a button labeled "ETF Annual Statement of Benefits: Enclosures and Explanation". At the bottom of the page, there is a service notice: "Service notice: This app may be offline on Sundays, 6-10 a.m. for routine maintenance."



Portal – Confirmation Statements

Statements as displayed when the Year column header is clicked twice – newest to oldest

UW MyUW Q Search

Benefit Information

Summary **Statements** Dependents

Year	Statement
2017	2018 Benefit Enrollment Confirmation Issued Oct 04, 2017
2017	2018 Benefit Enrollment Confirmation Issued Oct 04, 2017
2016	2017 Benefit Enrollment Confirmation Issued Nov 09, 2016
2016	2017 Benefit Enrollment Confirmation Issued Nov 11, 2016
2016	2017 Benefit Enrollment Confirmation Issued Nov 22, 2016
2016	Benefit Enrollment Confirmation New Hires Issued Aug 24, 2016
2016	ETF Annual Statement of Benefits (WRS) Issued 2017

ETF Annual Statement of Benefits: Enclosures and Explanation

Service notice: This app may be offline on Sundays, 6-10 a.m. for routine maintenance.

COBRA Introduction

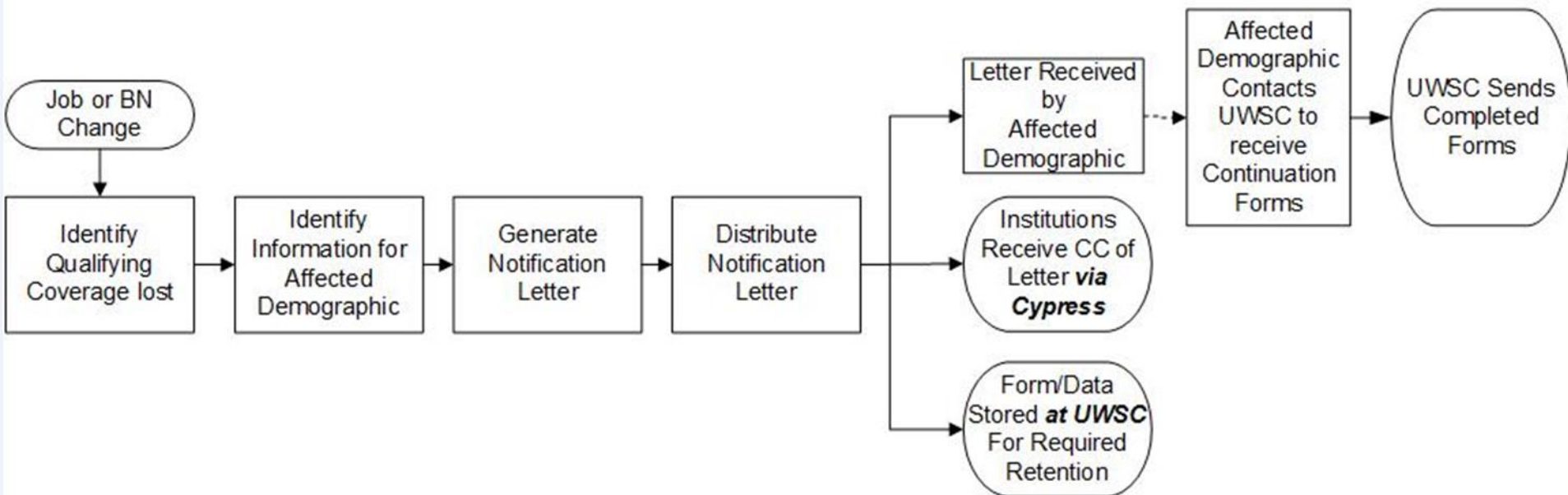
- COBRA has been identified as a process to be centralized and standardized
- We are excited to introduce the new automated COBRA process accomplishing primary goals:
 - Efficiency
 - Compliance
 - Data Integrity Improvement
- Go-Live Date: November 5, 2017

Overview of Process

- Job changes and life events causing benefit changes entered in HRS (Job Termination, Reduction in Hours (<33.33% for Grads), Life Event)
- Events are processed nightly and benefit records are updated
- Nightly COBRA process identifies non-voluntary coverage losses for employees
 - Generates letter
 - Sends to printer and is mailed
 - Copy to Cypress (for campus retention)
- Employee receives Notification Letter

Overview of Process

Centralized COBRA Process Overview (Implementation: November 5th, 2017)



Notification Letter

- COBRA Notification letter sent day after termination (driven from term event)
- Employee contacts institution regarding questions on job terminations
- Employee contacts UWSC to receive packet of COBRA Continuation Forms

Notification Letter



September 22, 2017
Employee ID: XXXXXXXXX
Institution: UW CAMPUS

EMPLOYEE NAME
528 WATER AVE
MADISON, WI 53704-5635

**IMPORTANT INFORMATION:
COBRA Continuation Coverage and other Health Coverage Alternatives**

Dear: Employee Name

This notice has important information about your right to continue your health care coverage in the *State Group Health Insurance Program* (the Plan), as well as other health coverage options that may be available to you, including coverage through the Health Insurance Marketplace at www.HealthCare.gov or call 1-800-318-2596. You may be able to get coverage through the Health Insurance Marketplace that costs less than COBRA continuation coverage. Please read the information in this notice very carefully before you make your decision.

You are receiving this notice because your coverage under the Plan will end on July 31, 2017 due to:

End of employment (18 Months Max Continuation Coverage)



Notification Letter

- COBRA letters that are generated will be available in Cypress
 - Beginning November 6th
 - One file per employee
 - Accessible in the Benefits folder

Cypress

3:18:49 PM 10/11/2017

- UWRPCHAR
- UWSC - A
 - <Default> (32*)
 - BN Confirmation Statements
 - Cobra (295)**
 - Recycle Bin
- UWSC - A01+
- UWSC - A02+
- UWSC - A0220
- UWSC - A0271
- UWSC - A0295
- UWSC - A03

Title	Created
Test Cobra_26 Day Letter f	10/11/2017 11:27:51 AM
Test Cobra_26 Day Lette	10/11/2017 11:27:50 AM
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COBRA Notice for Divorce

- In the event of Divorce:
 - Campuses enter ADM to remove the ex-spouse from HRS using Remove Dependent / Divorce – using effective date 1st of month following receipt of SGH application
 - Example: On 11/15/17 Employee drops off application to remove ex-spouse effective 11/30/17, campus needed to enter before the effective date for the COBRA to be sent out, if not entered in November, then the ex-spouse should remain on the plan until the month COBRA notice is sent
 - Campus updates relationship from Spouse to Ex-spouse (KB-18182)
 - Campus update address of ex-spouse in Dependent data if different than employees and letter will be sent to that address
 - COBRA notice will be generated the night the event is entered into the system

COBRA Cutover Plan for Institutions

- If the term effective date is 11/1/17 or earlier (last day worked is equal to or earlier than 10/31/17), institutions are responsible for providing COBRA notices to those employees
- The new COBRA process will handle:
 - Future terms entered before 11/1/17
 - Note: if the TER on-demand event has been finalized prior to 11/1/17, institution will need to do the COBRA notice.
 - Retroactive terms entered after 11/1/17
- For Domestic Partner changes effective 1/1/18
 - UWSC will handle COBRA notices

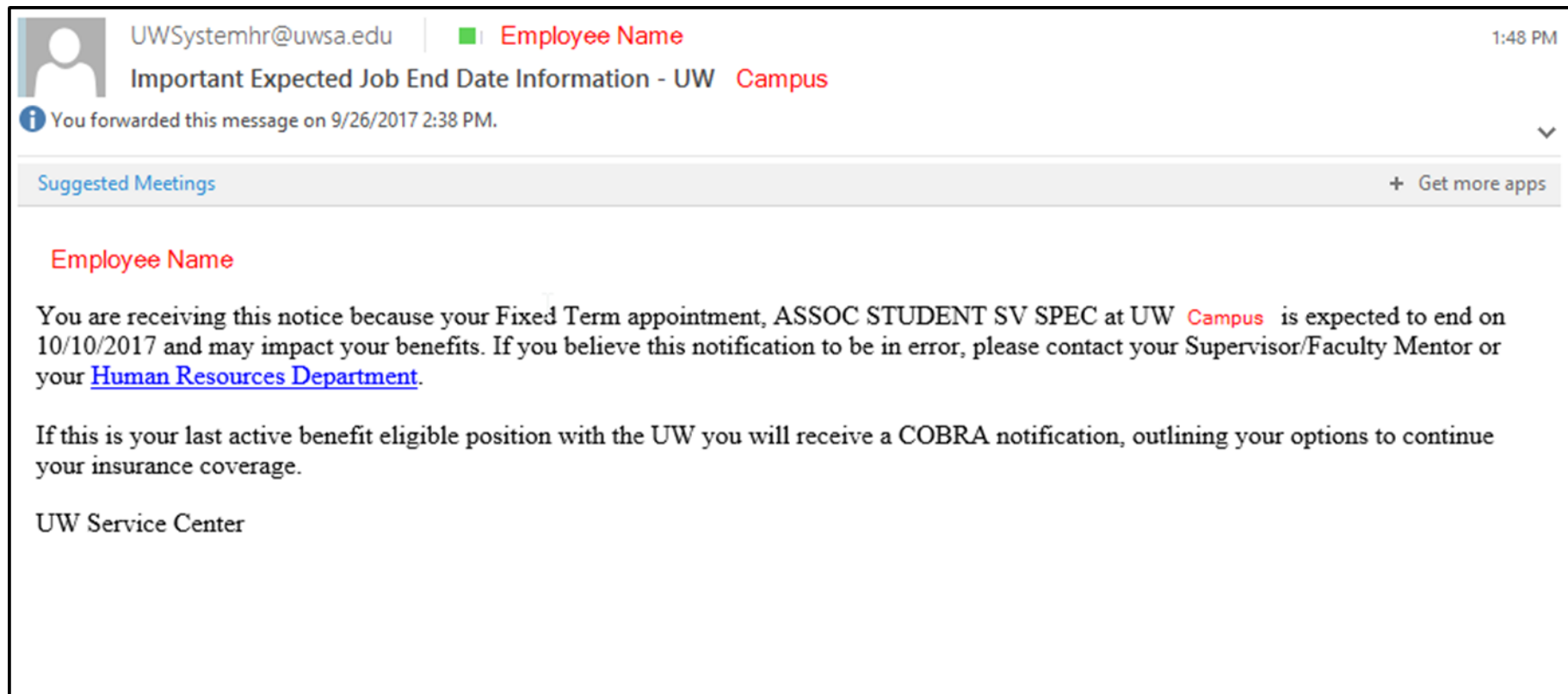
Questions?



EJED Email Notification

- EJED Notification email sent 14 days prior to the expected job end date on the job record to employees who are enrolled in benefits.
 - Employees to receive this before actual COBRA notice
 - The goal is to prevent unnecessary job and benefit terminations which trigger COBRA notifications being sent to employees
 - Sent from UWSystemHR@uwsa.edu

Sample of Email Notification



EJED Notification Examples

- Manual Term row entered in Job Data prior to the EJED Notification being generated:
 - EJED of 10/16/17 and enrolled in benefits
 - Entered a 10/1/2017 term row, system date 10/2/17
 - EJED Notification Process runs on 10/2/17
 - No email generated
- Extending EJED – timing of entry:
 - EJED 12/10/17, employee received email on 11/26/17
 - On 12/1/17 updated EJED to be 12/31/2017
 - Second email related to 12/31/17 end date will also be sent

Knowing Who Received EJED Email

- Employee contacts supervisor/HR department about this email
 - Review Job Data
 - Review the Employees who termed by reviewing the EJED Termination Report
 - Run the EJED Report

EJED Monitoring

- **EJED Query:**
- [KB 19326](#) HR - Expected Job End Date Query
 - Navigation path: *Reporting Tools > Query Viewer > UW_HR_EXPECTED_JOB_END_DATE*
 - Search Criteria - complete ALL four fields/options
 - Results in Excel can be sorted
- Take appropriate action to EJEDs on Job data
 - [KB 16409](#) HR - Maintaining Expected Job End Date
 - Reminder: Continuity may also need to be updated on the Position when making changes to the EJED.
- Best practice – Run and review EJED Query in advance

EJED Monitoring

- **EJED Termination Report:**
- [KB 16700](#) HR - HR Report List
 - Delivered nightly through Cypress
 - Lists the employees that were terminated during the nightly or monthly batch processes
 - Also shows if the employee was enrolled in benefits
- Best Practice – Used as a confirmation tool

Questions?



5-Day Termination Window Elimination

- **Current State:**

- There is a 5-day window between the termination date as entered into HRS and the actual finalization of the Termination Event, which terminates benefits enrollment.

- **Future State:**

- Termination events will finalize during overnight processing on the termination effective date as entered into HRS. The employee's benefit record will terminate and trigger the COBRA notification process.

5-Day Termination Window Elimination

- **Institution Impacts:**

- Reduce confusion around the mechanics and timing of the termination event caused by the 5-day window.
- Employees rehired after their termination date has passed will need an Administrative (ADM) Event opened in HRS to reinstate benefits.
- The need for manual finalization of Termination (TER) events during payroll weeks will be reduced.

Questions?



COBRA Readiness Page - Demo

- COBRA Project Readiness URL:

<https://uwservice.wisconsin.edu/hrs/project-readiness#4-tab>

PY: Non-Standard Payroll Calc Schedule

2017BW10A:

- 10/13 (Fri) – Paysheet Create (overnight)
- 10/16 (Mon) – Payline Request Deadline (4:30 pm)
- 10/16 (Mon) – Payline & Retro Load (overnight)
- 10/17 (Tues) – FICA Deadline (noon)
- 10/18 (Wed) – Final Calc & Confirm (noon)

2017UNC10:

- 10/19 (Thurs) – Paysheet Create (overnight)
- 10/23 (Mon) – Payline Request Deadline (4:30 pm)
- 10/23 (Mon) – Payline & Retro Load (overnight)
- 10/24 (Tues) – FICA Deadline (noon)
- 10/25 (Wed) – Final Cal & Confirm (noon)

PY Calendar Review

← Today 10A 10B 10M →

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

Institutional Feedback

- Questions
- Comments
- Feedback

Contact Us

- Contact your Affinity Group via Telephone, Email, Web Forms or Chat
- Visit our support page at <https://kb.wisc.edu/hrs/page.php?id=17960>

AG Support phone numbers

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

AG Support email addresses

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

LiveChat & Webforms

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 form to submit an incident](#)

Support Request Email

Please include the following in the subject line of your email:

- Description – EE Name – Empl Id/EmplRcd
- **Example Email Subject:**
 - *W2 Inquiry - Buckingham U Badger - 01234567/0*