UW UNIVERSITY OF WISCONSIN SYSTEM
SERVICE CENTER

Affinity Group 3
October 24, 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

- ABE
  - UW_BN_EBEN_PENDING WED Report
  - Reminder of Key Dates
  - Rescinded Elections / Appeals
- PUM Cutover
- COBRA
  - Domestic Partner
  - Age 26 Life Insurance
  - EJED Feedback
- PY
  - MPR Check Print Reminder
- Nonstandard Processing Schedule
- PY Calendar Review
- Institutional Feedback

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Issue: Employees who have started, but not finalized their eBenefit elections.

Action: Notify the employee of their eBenefit elections have not been confirmed which need to be completed by enrollment deadline.

Last WED update will happen in Thursday night batch.

Employee Process Status Report

To run manually throughout day on Friday:

Benefits > Manage Automated Enrollment > Investigate Exceptions > Employee Process Status Rpt

Issue: Employees have not confirmed their eBenefit elections on last day of enrollment deadline.

Action: Notify the employee of their eBenefit elections have not been confirmed.

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Event Process Statuses

Open Enrollment Process Statuses:

- Assigned None – Employee has a pending termination event prior to 1/1/2016.

- Assigned – A prior event is preventing OE from preparing.

- Prepared – Event is available to employee to enter enrollment changes.

- **Notified – Employee has made changes within eBenefits but they have not been submitted. These employees will be identified by the UW_BN_EBEN_PENDING report.**

- Entered – Employee has submitted enrollment changes which will be processed each evening by BenAdmin.

- Election Error – UWSC will be monitoring these and reaching out to the campuses.

- Finalized Program None – Employee is terminated.

- Finalized Enrolled – Employee is active and event has been finalized.

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- Open Enrollment ends at midnight on October 27 (Friday)
  - Benefits Batch will kick off at 12:01am on October 28
    (one minute after enrollment close)

- OS18 and OE18 events will be finalized and disconnected

- All Benefit Entry to be completed in HRS by Institutions
  - Deadline = end of day on November 3

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- Employees may withdraw/rescind an election made during ABE by notifying their human resources office (letter or e-mail) ***prior to the January 1 effective date.***
- **<u>If EE originally submitted paper application</u>**, institution should make a photocopy of the paper application submitted during ABE and write "RESCIND" across the top.
  - Institution should fax the 'rescind' application to UWSC Benefits
  - Institution should place 'rescind' application and the employee's written request in employee's benefit file
  - Institution should make entry into HRS:
    - Enter 1/1 ADM event to add back the coverage that was in effect on 12/31
- **<u>If EE originally made election via Self Service</u>**, institution should have employee fill out a paper application for the election that was made during ABE, sign it, and write "RESCIND" across the top.
  - Institution should fax the 'rescind' application to UWSC Benefits
  - Institution should place 'rescind' application and the employee's written request in employee's benefit file
  - Institution should make entry into HRS:
    - Enter 1/1 ADM event to add back the coverage that was in effect on 12/31
      The ABE election will be rescinded, and coverage that was in effect on December 31 will be reinstated.

Annual Benefits Enrollment (ABE) Appeals

There are separate appeals processes for SGH, Supplemental Plans, FSA and HSA.

- The following situations may be appealed:
  - Failed to enroll or change plan
  - Failed to change coverage level (e.g., single to family or family to single)

A late enrollment appeal and submission of an application <u>does not guarantee</u> approval.

Neglecting to take action during ABE is <u>not</u> a basis for appeal.

Appeals must be submitted by <u>January 31, 2018</u> to ensure they will be reviewed.

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- Employee submits a written request (letter or email) and application to their institution indicating the facts or circumstances regarding the reason(s) their application is being filed late and the remedy being sought.
- Institution develops a cover memo, letter or e-mail detailing the pertinent facts that either support or does not support the employee's request.
- Institution creates a WiscIT.
- Institution faxes application, employee letter, employer letter to: UWSC Benefits Team
  - Attn: Nick Faber (for SGH) or Lisa Bright (for Health Opt-Out)
  - –Please include WiscIT Incident # on the fax cover sheet
- UWSC Benefits Team will forward to ETF for consideration.
- UWSC Benefits Team will notify institution of decision.
- If approved, UWSC Benefits Team will enter enrollment/change in HRS.

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Supplemental Benefits - ABE Appeals

Dental Wisconsin, EPIC Benefits+ and VSP

- Employee submits a written request (letter or email) and application to their institution indicating the facts or circumstances regarding the reason(s) their application is being filed late and the remedy being sought.
- Institution develops a cover memo, letter or e-mail detailing the pertinent facts that either support or does not support the employee's request.
- Institution creates a WiscIT.
- Institution faxes application, employee letter, employer letter to: UWSC Benefits Team Attn: Christina Schmitz.
      -Please include WiscIT Incident # on the fax cover sheet.
- UWSC Benefits Team will forward to UWSHR for consideration.
- UWSC Benefits Team will notify institution of decision.
- If approved, UWSC Benefits Team will enter enrollment/change in HRS.

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FSA & HSA Appeals

Late enrollment appeals will be denied unless allowable circumstances are encountered, such as:

- <u>Administrative Error/Issue:</u>
  - Employer provided incorrect guidance on the ABE deadline date.
  - Employee experienced system issue during enrollment, such as a system glitch that caused the enrollment not to take.
    - Employees should review their Confirmation Statements and review their paychecks to ensure deductions are taken for the benefit plans they are enrolled in to confirm their elections were successful.
- <u>Employee Enrollment Error:</u>
  - Ex #1: Employee enrolled in Dependent Day Care FSA, but does not have any eligible dependents. Meant to enroll in Health Care FSA.
  - Ex #2: Employee enrolled in HSA but is not enrolled in an HDHP.

TASC Appeals Department will require supportive proof for all appeals.

- Employee completes a **TASC Enrollment Appeal Form.** Employee submits this form along with an application to their institution.
- Institution develops a cover memo, letter or e-mail detailing the pertinent facts that either support or does not support the employee's request.
- Institution creates a WiscIT.
- Institution faxes application, TASC Enrollment Appeal Form, and any proof to UWSC Benefits Team – Attn: Lisa Bright.
    - -Please include WiscIT Incident # on the fax cover sheet.
- UWSC Benefits Team will submit the appeal to TASC for consideration and will copy the institution.
- Employee and UWSC Benefits Team will be notified by TASC (by email) of the approval or denial.
- UWSC Benefits team will notify institution of decision.
- If approved, UWSC Benefits Team will enter enrollment/change in HRS.

Create a WiscIT with your AG

AG1: ag1@uwsa.edu

AG2: ag2@uwsa.edu

AG3: ag3@uwsa.edu

Fax materials to UWSC Benefits

(FAX) 608-890-2327

Reminder:

Appeals must be submitted by January 31, 2018 to ensure they will be reviewed.

HRS Project Readiness

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| Introduction | Benefits Administration System (BAS) | **HRS 9.2 Maintenance (PUM)** | COBRA | Internal |

| **HRS 9.2 Maintenance (PUM) Introduction** | New HRS (PUM) Functionality - 2017 |

With the upgrade of HRS to PeopleSoft version 9.2, the Service Center has made a commitment to keep HRS up to date. The upgrade has also positioned us to take full advantage of Oracle's new release strategy. While in the past Oracle provided new functionality in the context of full version releases (e.g. version 9.2), Oracle now releases updates quarterly 'PeopleSoft Update Manager' (or 'PUM') updates. These updates provide us an opportunity to introduce new functionality into HRS according to our own schedule and timeline.

The Service Center will be managing the development, testing and release of select new PUM-delivered functionality as an ongoing project, which we are calling 'HRS 9.2 Maintenance (PUM).' The pages on this site are intended to provide useful information to help the UW institutions understand, plan for and support the implementation of this new functionality.

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- HRS will go down on Friday, November 3at 4:00 p.m.
  - This will include the HRS services for employees accessed through the My Wisconsin portal, such as online Time Reporting, Absence Reporting, Benefits Self Service ('e-Benefits'), updates to Personal Information, and access to electronic Earnings Statements, Tax Statements, Leave Statements and other online HR, Payroll and Benefits reports.
- Overnight batch processing will occur as usual on Sunday, November 5.
- HRS will be available on Monday, November 6 (time TBD).

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- TAM will be unavailable during the outage period.
  - Institutions should consider (re)scheduling any TAM job openings/recruitments so that they will not close during or just before the outage weekend, or begin while the outage is still in place. HR and TAM access will end at 4:00 p.m. on Friday, November 3. HRS users and applicants will have access again on Monday, November 6 (time TBD).

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- OIM will not be available during this outage. Users will not be able to make or approve access requests for HRS.

- Systems that rely on HRS messaging will not receive any messages during this time (i.e. Integration Broker messages sending Person Data from HRS to SFS, Person Data from HRS to PICH).

- EPM will be unavailable to users from Friday, November 3 at 4:00 p.m. until Monday, November 6 (time TBD).

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Human Resources System Maintenance in November 2017 Will Affect Employee Access

Employees will not have access to their online timesheet, earnings statements and other related documents and services during a UW Human Resources System (HRS) outage that will occur in November 2017.

The outage is due to an HRS System maintenance and is scheduled to begin at 4:00 p.m. on Friday, November 4 and continue until Monday morning, November 6.

The following self-service features that employees access through the MyUW portals, UW System institutions and UW-Madison, will be **unavailable** during the outage:

- Online timesheet
- Absence reporting
- Benefits Self-service ('e-Benefits')
- Updates to personal information
- Access to electronic earnings statements, tax statements (W-2, 1042-S, etc.), leave statements and other HR, Payroll and Benefits documents.

Employees are encouraged to plan ahead and take care of HR, Payroll and Benefits related tasks in the portal **before** the outage begins. The rest of the portal, with the exception of the HRS System related features and documents, will be available during the HRS outage.

Once the HRS System is updated, employees will experience similar functionality that they are currently accustomed to. The upgrade will have minimal impact on system look and feel.

The HRS System manages UW Human Resources, Payroll and Benefits processing for all UW System institutions. The system is currently running on PeopleSoft's Human Capital Management software version 9.2.

Source: UW Service Center

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- Institutions will be notified when HRS is available on November 6, 2017.
  - November A batch processing will begin as scheduled on November 10, 2017.

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Domestic Partner COBRA

- List was distributed to Ben Administrators October 11

- The Service Center will mail Domestic Partner COBRA letter and forms for SGH, Dental Wisconsin, EPIC Benefits+ & VSP by November 15

- Copies of letters and forms will be mailed to the Institutions

Age 26 Life Insurance Conversion

- Upon receipt of notification (by employee), institutions will be responsible for sending conversion forms for life insurance for children turning 26.

- Reason: This data is not stored in HRS so the only way to know the dependent needs a conversion form is the application to remove.

- Aging Child Dependent's eligibility chart:

  https://www.wisconsin.edu/ohrwd/admin/download/child-dep-status.pdf

- EJED process
  - Helps with primary COBRA goals
  - Also helps ensure BAS Data Compliance
    - Term/Rehire
    - 30 day entry restrictions
    - Lump Sum Job Maintenance

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- EJED Feedback
  - Will exclude Summer Service and Summer Session Jobs (will be addressed after the 11/5 rollout but before the Summer, to exclude)
  - Employees with an EJED and in Pay Group: NON and HST will NOT receive an email, 11/5
  - Reviewing the request to add benefit eligible indicator on EJED Query
  - Will review request for WED/Pagelet
    - Does not meet requirements for WED-not actionable
    - Query exists
    - Will review pagelet option

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

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- **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

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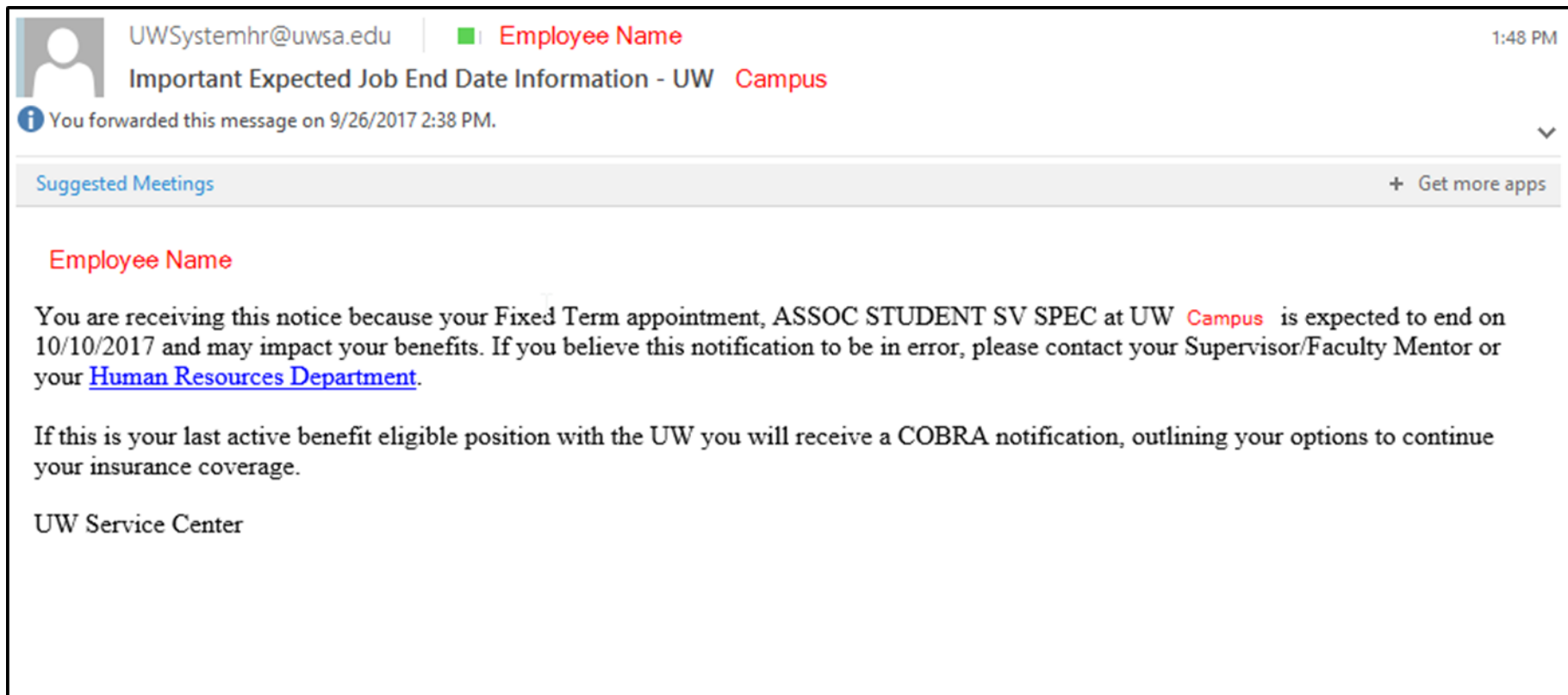SERVICE CENTER

- EJED Feedback
  - If a term row is entered prior to the EJED process inserting the row, the notice will not be sent
  - Run EJED Query as part of your daily routine
    - Send out email notes to supervisors asking for confirmation of employment termination
    - Advise employees upon hire/term that these positions may receive a notice when their jobs are set to end

- EJED Notification email sent 14 days prior to the <u>expected job end date</u> on the job record to employees who are <u>enrolled in benefits</u>.
  - 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

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UWSystemhr@uwsa.edu   ■ Employee Name   1:48 PM

Important Expected Job End Date Information - UW   Campus

ⓘ You forwarded this message on 9/26/2017 2:38 PM.   ⌄

Suggested Meetings   + Get more apps

Employee Name

You are receiving this notice because your Fixed Term appointment, ASSOC STUDENT SV SPEC at UW   Campus   is expected to end on 10/10/2017 and may impact your benefits. If you believe this notification to be in error, please contact your Supervisor/Faculty Mentor or your Human Resources Department.

If this is your last active benefit eligible position with the UW you will receive a COBRA notification, outlining your options to continue your insurance coverage.

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- Checks will be cut one day per week on Wednesdays
- Work on direct deposit for off-cycles is underway
- Process Cutover:
  - Submissions by noon on October 18 will be printed on October 19 (last Thursday print)
  - Submissions after noon on October 18 will be printed on October 25 (the first Wednesday print)

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PY: Non-Standard Payroll Calc Schedule

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)

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PY Calendar Review

October 2017

| 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**

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

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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	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

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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*

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