



Affinity Group 3

November 28, 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

- Life Insurance Coverage Effective Dates
- ICI Annual Review Prep
- FSA Unsubstantiated Claims
- ALEX Rollout
- 2018 WRS Rates
- Wellness Incentive
- ABE Administrators Survey
- LH Earnings for Part-time University Staff
- Absence Balance Review for University Staff
- Biweekly Unpaid Time at Calendar Year End
- Annual Leave Option for Trades/Craftworkers - Reminder
- Direct Check Mailing to Employees
- PUM Resources
- Key Year-End Payroll Dates
- PY Calendar Review
- Institutional Feedback

Life Insurance Coverage Effective Date

- Effective dates vary from plan to plan
- Dates also vary based on the event
- All plans (except UIA) coverage ends the end of the month following termination of employment
- Cancellation or Reduction of coverage must be done on a paper application
- Life event changes must be completed within 30 days of the event
- Evidence of Insurability applications can be submitted at any time

Life Insurance Coverage Effective Dates

Event	Plans	Effective Date
New Hire/Newly Eligible Enrollment	All (except UIA)	1 st of the month following 30 days after the event
New Enrollment (<i>outside of initial enrollment period</i>)	Accidental Death & Dismemberment (AD&D)	1 st of the month following the receipt of the application
Life Event Change	State Group Life, Individual & Family and AD&D	1 st of the month following 30 days after the event
Evidence of Insurability (EOI)	State Group Life, Individual & Family and UW Employees	1 st of the month following approval of application
Cancellation or Reduction in Coverage	State Group Life	End of the month following the month application is received
Cancellation or Reduction in Coverage	Individual & Family, AD&D, UW Employees	End of the month following the receipt of the application
New Eligibility Enrollment	University Insurance Association (UIA)	October 1, 20XX
Termination/Loss of eligibility	University Insurance Association (UIA)	September 30, 20XX

ICI Annual Review Prep

- Leave reporting needs to be current
- Update Job Data with current FTE and LOA status
- Review WED Reports:
 - UW_BN_ICI_ABBR
 - UW_BN_ABBR_UNROUNDED
 - UW_BN_ABBR_MISMATCH
 - UW_BN_AGE_70
 - UW_BN_ICI_COELECT
 - UW_BN_ICI_MISSING_ENROLLMENT
- More details in upcoming AG Calls

Questions?



FSA Unsubstantiated Claims

This information is being provided to institutions as a background and guideline to the FSA unsubstantiated claims process that will be occurring over the next several months.

No action is require by institutions at this time.

If employees have questions, direct them to TASC at (844) 786-3947 or (608) 316-2408 or 1customercare@tasconline.com

Background:

- FSAs are tax-free accounts, subject to IRS regulations.
- IRS regulations require all payments made from a FSA be substantiated.
- Over 90% of claims are auto-substantiated.
- Claims that are not auto-substantiated are automatically entered into a progressive five-step process.

TASC & ETF Five-Step Process

1. Notification (three notices from TASC)
 2. Claim denial at 45 days and card deactivated
 3. Payroll Withholding of unsubstantiated claims (runs concurrent with step 4)
 4. Substitute unsubstantiated claims with other eligible expenses
 5. ETF Recovery as Other Business Indebtedness (occurs late 2018)
- Expenses incurred during the plan year, January 1 - December 31, 2017 should be substantiated by December 31, 2017.
 - If a claim remains unsubstantiated after December 31, payroll withholding will occur during the run-out period (January 1 - March 31, 2018).

FSA Unsubstantiated Claims

Notification of an Unsubstantiated Claim:

If a claim requires substantiation, the participant receives three notices from the FSA administrator (TASC):

- First notice – 1 day after initial TASC Card transaction
- Second notice – 15 days after initial TASC Card transaction
- Third notice – 30 days after the initial TASC Card transaction

If a claim is not substantiated within 45 days, the claim is denied and the participant's TASC Card is deactivated.

Resolving Unsubstantiated Claims:

By the end of the plan year, a participant can:

- Substantiate the claim with documentation
- Substitute the claim with another eligible expense
- Repay the amount of the unsubstantiated claim to TASC

Current Unsubstantiated Claims

As of Friday, November 16, 2017, there are 1,015 participants with a total of \$289,727 in unsubstantiated claims.

- 433 at or under \$100.00
- 218 between \$100.01 and \$250.00
- 222 between \$250.01 and \$500.00
- 141 at or above \$500.01

A report will be sent to institutions along with the communication to employees in the coming weeks.

Payroll Withholding

- Balances under \$100
The balance will be taken out of one paycheck (bi-weekly or monthly).
- Balances between \$100.00 and \$250.00
The balance will be divided into even deduction amounts per pay period until the end of the run-out period.
- Balances \$250.01 and more
A minimum amount of \$250.00 is to be divided into even deduction amounts per pay period until the end of the run-out period.

FSA Unsubstantiated Claims

Payroll Dates of Unsubstantiated Claim Deductions

Monthly

Pay Period

January

February

March

Pay Date

02/01/2018

03/01/2018

03/30/2018

Bi-weekly

Pay Period

01/07/2018 – 01/20/2018

01/20/2018 – 02/03/2018

02/04/2018 – 02/17/2018

02/18/2018 – 03/03/2018

03/04/2018 – 03/17/2018

Pay Date

02/01/2018

02/15/2018

03/01/2018

03/15/2018

03/29/2018

Note:

ETF and TASC strongly encourage participants to substantiate claims by 12/31/17 using the standard substantiate process; however, employees can use the plan correction process to substantiate during the run-out period.

If an employee uses the plan correction process to substantiate during the run-out period and after a payroll deduction has occurred, TASC will refund the employee.

FSA Unsubstantiated Claims

Communication

In addition to the three emails for each unsubstantiated claim, participants will receive the following communication going forward:

- **Five emails from TASC**
(November 17, November 27, December 5, December 12, December 19)
- **Three emails from UW System HR (approximate dates)***
(November 27, December 12, December 19)
- **Three home mailers from TASC**
(November 17, December 5, December 19)

*Institutions will receive a list of employees along with the communication sent to employees.

In late December, UW System Human Resources will request institutions reach out to employees with balances of \$500 or more.

FSA Unsubstantiated Claims

Contact TASC

If employees call with questions about their account, how to substantiate a claim, etc., please refer them to TASC. TASC has the tools and resources to research the employee's account.

TASC Customer Care:

844-786-3947 or 608-316-2408

1customercare@tasconline.com

Questions?



ALEX Rollout

- ALEX was rolled out for Annual Benefit Enrollment system-wide.
- ALEX is being enhanced to add all benefit programs. Rollout will be early December.
- Can be used with new employees and existing employees.
- ALEX can also be used as a recruitment tool with prospective employees!
- Go to <https://www.wisconsin.edu/ohrwd/benefits/alex/> to find out more.



ALEX Analytics for ABE

- Annual Benefits Enrollment (ABE)
 - 14,960 visits to ALEX
 - 36% of benefits eligible population. According to JellyVision this is on par with their customers in the education industry and similar size employers.
- Survey questions asked in ALEX:
 - Do you feel like you have a better understanding of how your medical benefits work now?
 - 73.8% of survey respondents said Yes, definitely or Yes, a little.
 - How helpful was this medical section for you?
 - 58.6% of survey respondents said Extremely helpful or Very helpful.

Questions?



WRS Employee rate change effective for 2017UNC12 and 2017BW12B payrolls:

- General 6.70% (↓ 0.10%)
- Executive 6.70% (↓ 0.10%)
- Protective 6.70% (↓ 0.10%)
- Teacher 6.70% (↓ 0.10%)

Wellness Incentive – Taxable Income

- \$150 Well Wisconsin Incentive and incentives from employees' health plan carriers are taxable income.
- IRS considers these incentives a fringe benefit.
- Department of Employee Trust Funds (ETF) sends reports:
 - August report – employees taxed
 - August 31st for bi-weekly
 - September 1st for monthly
 - November report – employees will be taxed
 - December 7th for bi-weekly
 - December 1st payroll for monthly
- Reports have been sent to institutions.
- Email template was provided.
- Questions should be directed to StayWell or to the health plan carriers. Report will have a code that indicates the incentive source – StayWell or health plan carrier.

ABE Administrators Survey

- As part of ongoing efforts to improve the materials and information provided to you, as a Benefits administrator, and to employees for the Annual Benefits Enrollment (ABE) period, we ask that you complete a survey at:
http://uwsystemadmin.qualtrics.com/jfe/form/SV_9uUVoEggnshLN09
- Please share this survey link with other staff members in your office who played a role in the ABE process.
- The survey will remain open until December 15, 2017. Your feedback will be valuable in planning for ABE 2019.

LH Earnings Rate for Part-Time University Staff

- Per UPS OP BN2 or HRD KB 53500, part-time employees earn LH prorated based on hours paid during the pay period that includes the legal holiday.
 - HRS will evaluate total paid hours for the period to determine LH accrual
 - In the past, LH accrual was based on the greater of FTE or paid hours

Absence Balance Review for University Staff

- Please run the Leave Balance Report to assist employees with notification of leave that may expire if not used (KB 30503).
- Please run the Negative Vacation Allocation report for active employees. These are employees who have overdrawn their vacation and the hours need to be paid back as soon as possible (KB 31541).

Biweekly Unpaid Time as Calendar Year End Nears

- The note below is in each of the daily “Action Needed: HRS Absence Management - Biweekly Unpaid Time” UW SC Communication emails you receive during calc week.
- This is a frequently asked question as we near calendar year end and employees are exhausting their leave balances.
- **PLEASE NOTE:** Employees may appear to have unpaid time if the employee's hours for the current period are not all entered/approved yet. The system is now using the actual hours processed for the current pay period to determine that period's accruals; once all the time is approved and processed, the accruals will be "whole" for that period. This will only impact employees nearing a zero balance for Vacation, so the impact should be minimal.

Annual Leave Option for Trades/Craftworkers - Reminder

- Trades/Crafts Employees vacation election for 2018
- Vacation Option Election form - Forms due January 1, 2018
 - <https://uwservice.wisc.edu/docs/forms/hr-vacation-option-election.pdf>
- The Craftworker Vacation Allocation is driven by their Rate of Pay in the HRS Job Data
- Please enter any Pay Rate Changes before the January A (1A) payroll deadline in order for the correct allocation to be given as of the 1st earnings statement for 2018
- [HR - Craftworker Vacation Election KB 19586](#)

Direct Check Mailing to EE's

- Beginning in early 2018, the Service Center will be mailing checks (on and off-cycle) to all employees who don't have direct deposit.
- WHY?
 - For Campus Efficiency / Consistency
 - SOD Audit Control Concern
- Please provide feedback related to your concerns.

Questions?



PUM Resources for Employees

- PUM resources that were found on project readiness page now available on the employee facing pages
- Personal Information
 - Video: Updating Personal Information
 - Tip sheets: One for each section (e.g., Addresses, Contact Details, etc.)
- Absence Management
 - Employees (ESS)
 - Video: Cancel or edit an absence
 - Tip sheet: Cancel or edit an absence
 - Managers (MSS)
 - Video: Cancel or edit an absence

Navigation to these Pages

- **Service Center home page:**



University of Wisconsin Service Center

WELCOME TO THE UNIVERSITY OF WISCONSIN SERVICE CENTER

[SERVICE CENTER HOME](#)

[MY UW HELP](#)

[FORMS/PUBLICATIONS](#)

[HRS ADMINISTRATION](#)

[SEARCH UWSC](#)

Welcome to the UW Service Center

The UW Service Center provides payroll and benefits support to 13 four-year universities, 13 freshman-sophomore UW Colleges campuses, and statewide UW-Extension that make up the UW System.

Upcoming Pay Dates

- **Biweekly:** Wednesday, November 22
- **Monthly:** Friday, December 1
- **Student Hourly:** Wednesday, November 22

[2017 UW Employee Payroll Calendar](#)
[2018 UW Employee Payroll Calendar](#)

For Employees and Managers

Log into [My UW](#) to view your earnings statements, tax statements and more. The links below offer help with the work-related modules available in My UW, along with additional helpful resources.

- [Benefit Information](#)
- [Payroll Information](#)
- [Personal Information](#)
- [Time and Absence](#)

HR, Payroll and Benefit News

What You Need to Know About Your 2018 Insurance Benefits

UW System Human Resources

NOVEMBER 15, 2017

[Review your 2018 Benefit Enrollments](#)

As 2017 draws to a close, now ...

[2018 Tax-Sheltered Annuity and](#)

Navigation to these Pages

- From the Portal Help Pages (Time & Absence Example)

The screenshot shows the MyUW portal interface for Time and Absence. At the top, there is a search bar and a user profile icon with the letter 'J'. Below the search bar, the page title is "Time and Absence". On the right side, there is a "Help" button highlighted with a red box. Below the title, there are two buttons: "Enter Absence" and "Edit/Cancel Absence". Underneath these buttons, there are three tabs: "Absence" (which is selected and underlined), "Leave Balances", and "Leave Reports". Below the tabs, there is a pagination control with buttons for "Previous", "1", "2", "3", "4", "5", "6", and "Next". At the bottom, there is a table with the following data:

Name	Status	Start	End	Total
Vacation (UNC)	Approved	10/26/2017	10/26/2017	8

Time and Absence Help

The screenshot shows the navigation bar for the Time and Absence Help page. It contains several buttons: "Getting Help", "For Employees", "For Managers", "Leave Statement Help", "HR Contacts", and "Helpdesk". The "For Employees" and "For Managers" buttons are highlighted with a red box.

PUM Resources for Employees

- Feel free to share these resources with your employees
- In addition to the new PUM resources, these pages can also be a great resource for new hires

Key Year-End Payroll Dates

December

- 12/1/17 Last on-cycle pay date in 2017 for monthly paid staff (the 11M)
- 12/15/17 Check Correction deadline to guarantee employees' original W-2s reflect the correct amounts
- 12/21/17 Last on-cycle pay date in 2017 for bi-weekly paid staff (the 12A)
- 12/26/17 NOON – Deadline for Missed Payroll submissions for inclusion on 2017 W-2s
- 12/27/17 Last off-cycle check date for 2017 (bi-weekly and monthly paid staff)
- 12/29/17 6:00PM! Deadline for Foreign National Personal Data Changes in Glacier (related to 1042-S 2017)

Key Year-End Payroll Dates

January

- 1/5/18 Final deadline for last minute Check Correction adjustments on an employee's W-2 (not guaranteed, based on volume)
Deadline for Taxable Fringe Adjustments for calendar year 2017
Deadline for Guaranteed Personal Data Changes (for ACA and W2 data)
- 1/23/18 Targeted date for finish printing W2s
- 1/30/18 Targeted date for employees to receive 2017 W-2s
- 1/31/18 IRS postmark deadline for employees 2017 W-2s

Key Year-End Payroll Dates

February

- 2/16/18 Targeted print date for 2017 Fellowship/Scholarship Letters
- 2/28/18 Targeted print date for 2017 1042-S forms

March

- 3/2/18 CYE posts to WISDM (approximately)
- 3/10/18 Targeted date for employees to receive 2017 1042-S forms
(3/15/2018 due)

PY Calendar Review



Institution Feedback

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

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*