

### Affinity Group 3 December 5, 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

BN: ICI Annual Review

Self Service Change

ACA: Reminder

TAM: New Job Codes

PY: Paycheck Modeler

Direct Check Mailing to Employees

Nonstandard Processing Schedule

Key Year-End Payroll Dates

Calendar Review

Institutional Feedback



### eBenefits vs Paper Applications

## Congratulations!

Percentage of employees that made elections for 1/1/2018 coverage (both open enrollment and new employees):

93% used eBenefits 7% used paper applications



# ICI Annual Update

# What is the ICI Annual Update?

An annual review of employees <u>currently enrolled</u> in ICI where their monthly premium may change.

# When is the ICI Annual Update?

Job Data is updated effective 2/1/2018 based on their ICI category eligibility. The premium change starts with the February A paid 2/15/2018 and February Monthly paid 3/1/2018.

# ICI Annual Update

# How is the ICI premium determined?

- Coverage level (Annual Base Benefit Rate or ABBR) is based on last year's WRS earnings except in the following situations:
  - New Hires
  - FTE changes
  - Leave of Absence
  - Changing WRS employment category (University Staff to FA/AS/LI or FA/AS/LI to University Staff)
- Benefit plan enrollment for University Staff ICI category is reviewed and updated (if applicable) based on sick leave balance as of December B (pay period end 12/23/2017)

# ICI University Staff Categories

ICI Category	Sick Leave Hours*
University Staff - Category 1	< 184 Life to date balance
University Staff - Category 2	184 – 519 Life to date balance
University Staff - Category 3	80 Year to date balance**
University Staff - Category 4	520 – 727 Life to date balance
University Staff - Category 5	728 – 1040 Life to date balance
University Staff - Category 6	> 1040 Life to date balance

<sup>\*</sup>Based on sick leave balance as of December B (pay period end 12/23/2017)

<sup>\*\*</sup>Prorated based on FTE or sick leave earned

### **ICI** Timeline

- December 31, 2017 Employee deadline to notify Campus Administrators to swap leave time
- January 9, 2018 Campus Administrators deadline for entering leave time swap
- January 16 19, 2018 UWSC will send email notices to employees eligible for Deferred or Supplemental enrollment into ICI
- January 26 28, 2018 UWSC will be updating Job Data, ICI Benefit plan enrollment, and ICI ABBRs

NOTE: Once the ICI annual update process runs, any leave swaps will NOT change the 2018 ICI premium category

## Sick Leave Swap

# What is sick leave swap?

An optional notification by the institution or departments for employees to be notified about swapping out used sick leave for unused leave.

The opportunity to swap used sick leave for unused leave can decrease premiums or provide enrollment opportunities.

# Sick Leave Swap Period for 2017

# Eligible timeframe for swapping:

University Staff: January A 2017(PP) to December B 2017

- Eligible pay period dates: 12/25/2016 12/23/2017
- Eligible leave swap is:
  - 13A 2016: 12/25/2016 12/31/2016
  - 1A thru 12B 2017: 1/1/2017 12/23/2017
- Before performing a leave swap, check EACH calendar year's end balances to be sure balance is available before swapping.
- Swapping sick leave that happens after December 24<sup>th</sup> 2017 will not impact the 2018 ICI Annual Review

FA/AS/LI: January 1st 2017 thru December 31th 2017

### What is it?

A report created by the UWSC to display a snapshot in time of current sick leave balances and <u>assumed</u> sick leave earnings that may be used for counseling the employee on swapping opportunities.

Counseling employees on their leave balances is optional.

Reports will be sent to campuses following AG calls this week.

# What assumptions are made?

- Job Data accurately reflects FTE and leave of absences
- All leave balances are up to date as of the November B payroll
- Employee will earn sick leave based on FTE
- Employee will <u>not</u> use any sick leave for the remainder of the year
- Removed employees age 70 or older
- Removed employees enrolled into Category 6

## Considerations

- Retroactive Job Data changes
- Job Data does not always reflect working FTE therefore employees may not earn sick leave based on FTE
- Leave balances are changed retroactively (12/25/2016-12/23/2017)
- Employee use of sick leave from 11/26/2017-12/23/2017 (use of leave during these times will not be reflected on report)

# What do to with the report?

- Notify all employees to make sure their leave balances are up to date and let you know by December 31, 2017, if they want to swap leave.
- Advise employees that they are eligible to swap leave to meet ICI categories.
- Take no action as it is optional.

# How to use report?

Filter the "Projected SL Balance" and "Projected SL YTD Earned-Used" for employees who are:

- Close to reaching a new Permanent Plateau
- Close to reaching a higher category
- Close to reaching the special category 3
- Are not currently enrolled in ICI and qualify for deferred enrollment. (Cat 3, 4, 5, or 6)
- Decide on the variable used to determine target population

See KB-58681 for detailed explanation

# Sick Leave Management

## How to view balances?

\*\*REMEMBER BALANCES ARE as of 11B (snapshot)

**2017 SL Balance** = Life time sick leave balance. This determines all category changes except Category 3.

**2017 SL YTD Earned-Used** = Amount of current year sick leave earned minus used balance. This is for CAT 3 only.

### References

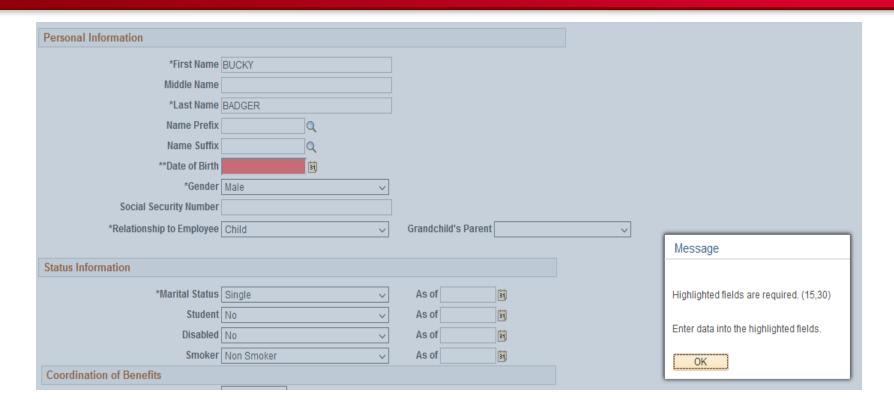
### **Administrator References:**

- ICI Administrator Landing page
- BN University Staff ICI Annual Sick Leave Swap Report (2016) – KB #58681
- AM Managing Absences for a Prior Pay Period (Payroll Coordinator) – KB #16880
- AM Results by Calendar KB #19169
- Annual Leave Swap Deadline Administrative Policy
- <u>UWMSN Sick Leave Policy</u>

# Questions



### Self Service Change - DOB Required for Dependents



DOB is now required for dependents in the Self Service module. Employees will NOT be able to save any dependents without providing DOB.



### **ACA Reminders**

- TL Entry
  - Reminder to enter ACA hours timely
  - Monthly ACA process only updates back 90 days
    - Updates to older time periods will not show in the reports until the full year process in December
- 2017 full year ACA hours catch-up
  - Deadline for entry older than 90 days: December 20<sup>th</sup>
- December hours processed in January moved to January 6<sup>th</sup>
  - Deadline for December time entry: January 5<sup>th</sup>



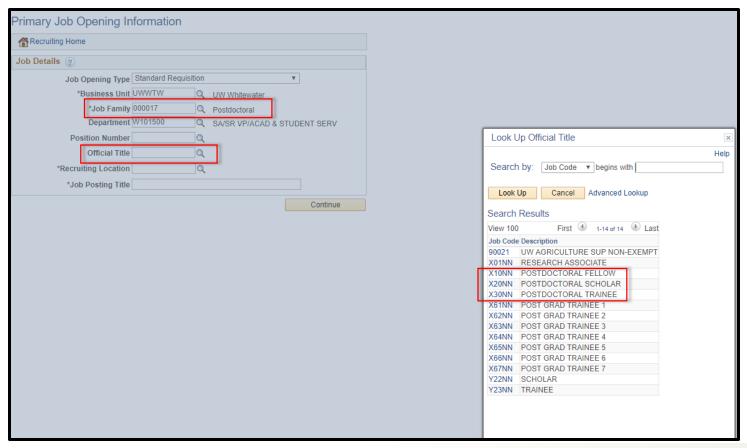
### TAM – New Job Codes added to TAM

- In response to a campus request, TAM Job
   Openings now allow the use of the ET2 Empl Class
- The following Job Codes are available when the Postdoctoral Job Family is selected:
  - X10NN Postdoctoral Fellow
  - X20NN Postdoctoral Scholar
  - X30NN Postdoctoral Trainee



### TAM – New Job Codes added to TAM

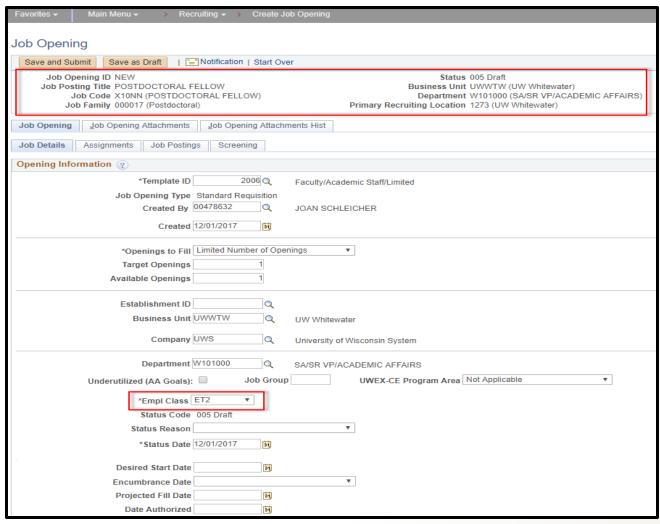
When creating a Job Opening, choose the Postdoctoral Job Family and one of the new Job Code Titles. Empl Class ET2 will populate in the Job Opening Details.





### TAM – New Job Codes added to TAM

### Job Opening Details





# Questions



## Paycheck Modeler

- Paycheck Modeler was added to the UW\_UNV\_BN\_CAMPUS\_BN\_UPD (BN Campus Benefits Update) security role on 12/3
- Already added to the UW\_UNV\_PY\_PAYROLL\_UPD (PY Payroll Processing) security role as of 11/5



## Direct Mailing to EE's

### Reminder:

- 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
- Continue to send feedback to AGs.
- We hope to address your concerns as this process takes shape.

## Paper Check Direct Mailing FAQs

#### When will the printed checks stop going to the campuses?

- In early 2018, the Service Center will forego mailing all printed checks to each campus.
- Paper checks will be mailed to the employee's address printed on the check.

#### Where will the checks be mailed?

- Each employee has a setting on their account in HRS that defines the selected address to print on the check.
- The default address is HOME, but it can be changed to MAILING or another address of their choosing.
- See KB#16561

#### When will the employee receive their paper check?

- Off-cycle checks are printed in house every Wednesday and will be mailed the same day.
- On-cycle paper checks for biweekly employees will be mailed the day before the paydate which will typically be on Wednesday.
- On-cycle paper checks for monthly employees will be mailed one business day before the paycheck date.

## Paper Check Direct Mailing FAQs

- What is our obligation as an employer for getting checks to the employees?
  - Per General Counsel at UWSA, the UW has a 6 day grace period after the pay date to have the check received by the employee.
- Who will the employee contact if they did not receive a check?
  - Employees will continue to contact their campus payroll coordinators.
  - Payroll Coordinators can use Review Paycheck to determine:
    - When the check was printed and mailed
    - Whether the check has been cashed (although this is only updated monthly)
    - Contact the Service Center for current check status

# Questions



### Non-Standard Payroll Calc Schedule

### 2017UNC12:

- 12/15 Paysheet Create (overnight)
- 12/18 Payline Request Deadline (4:30 pm)
- 12/18 Payline & Retro Load (overnight)
- 12/19 FICA Deadline (noon)
- 12/20 Final Calc & Confirm (noon)

### 2017BW12B:

- 12/21 Paysheet Create (overnight)
- 12/26 Payline Request Deadline (4:30 pm)
- 12/26 Payline & Retro Load (overnight)
- 12/27 FICA Deadline (noon)
- 12/28 Final Cal & Confirm (10:00 AM)



### 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**

•	oday		December 2017	12A 12B	12M	Ð
Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27.	28	29.	30	[12M] Pay Period Begin [11M] Pay Date	2
3.	4.	5.	<u>6</u>	7. [11B] Pay Date	<u>8</u>	g [12A] Pay Period End
10	11	12	13	14	15	16
[12B] Pay Period Begin [12A] 1st Batch Prelim Calc	[12A] 2nd Batch Prelim Calc	[12A] 3rd Batch Prelim Calc [12A] Payroll and Benefit Retro and Payline Load	[12A] 4th Batch Prelim Calc [12A] FICA Deadline	[12A] Final Calc [12A] Confirmation Deadline (Eve)	[12M] 1st Batch Prelim Calc	-
17 [12M] 2nd Batch	18 [12M] Payroll and	19 [12M] 4th Batch	20 [12M]	21 [12B] 1st Batch	22 [12B] 2nd Batch	23 [12B] Pay Period
Prelim Calc	Benefit Retro and	Prelim Calc	Confirmation	Prelim Calc	Prelim Calc	End
	Payline Load [12M] 3rd Batch Prelim Calc	[12M] FICA Deadline	Deadline (Eve) [12M] Final Calc	[12A] Pay Date		
24	25	26	27	28	29	30
[1A] Pay Period Begin	Christmas Day	[12B] 3rd Batch Prelim Calc	[12B] FICA Deadline	[12B] Final Calc [12B]		
Christmas Eve		[12B] Payroll and Benefit Retro and Payline Load	[12B] 4th Batch Prelim Calc	Confirmation Deadline (Mor)		
31 [12M] Pay Period End New Year's Eve	1.	2.	3.	4.	5.	6



### Institution Feedback

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



### Contact Us

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

#### 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 from 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

