



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

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 currently enrolled 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

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

**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 24th 2017 will not impact the 2018 ICI Annual Review

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

Projected Sick Leave Balance Report

What is it?

A report created by the UWSC to display a snapshot in time of current sick leave balances and assumed 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.

Projected Sick Leave Balance Report

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 not use any sick leave for the remainder of the year
- Removed employees age 70 or older
- Removed employees enrolled into Category 6

Projected Sick Leave Balance Report

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)

Projected Sick Leave Balance 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.

Projected Sick Leave Balance Report

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](#)
- [UWMSN Sick Leave Policy](#)

Questions



Self Service Change – DOB Required for Dependents

The screenshot shows a web form for adding a dependent. The form is divided into three sections: Personal Information, Status Information, and Coordination of Benefits. In the Personal Information section, the fields for *First Name (BUCKY), *Last Name (BADGER), *Gender (Male), and *Relationship to Employee (Child) are filled. The **Date of Birth field is highlighted in red, indicating it is required. A validation message box is open on the right, stating: "Message", "Highlighted fields are required. (15,30)", "Enter data into the highlighted fields.", and "OK".

Personal Information

*First Name

Middle Name

*Last Name

Name Prefix

Name Suffix

**Date of Birth

*Gender

Social Security Number

*Relationship to Employee

Grandchild's Parent

Status Information

*Marital Status As of

Student As of

Disabled As of

Smoker As of

Coordination of Benefits

Message

Highlighted fields are required. (15,30)

Enter data into the highlighted fields.

OK

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 20th
- December hours processed in January moved to January 6th
 - Deadline for December time entry: January 5th

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.

The screenshot displays the 'Primary Job Opening Information' form in the TAM system. The 'Job Details' section includes the following fields:

- Job Opening Type: Standard Requisition
- *Business Unit: UWWTW (UW Whitewater)
- *Job Family: 000017 (Postdoctoral)
- Department: W101500 (SA/SR VP/ACAD & STUDENT SERV)
- Position Number: [Empty]
- Official Title: [Empty]
- *Recruiting Location: [Empty]
- *Job Posting Title: [Empty]

A 'Continue' button is located at the bottom right of the form. An overlay window titled 'Look Up Official Title' is open on the right side. It shows search results for 'Job Code' with the following table:

Job Code	Description
90021	UW AGRICULTURE SUP NON-EXEMPT
X01NN	RESEARCH ASSOCIATE
X10NN	POSTDOCTORAL FELLOW
X20NN	POSTDOCTORAL SCHOLAR
X30NN	POSTDOCTORAL TRAINEE
X61NN	POST GRAD TRAINEE 1
X62NN	POST GRAD TRAINEE 2
X63NN	POST GRAD TRAINEE 3
X64NN	POST GRAD TRAINEE 4
X65NN	POST GRAD TRAINEE 5
X66NN	POST GRAD TRAINEE 6
X67NN	POST GRAD TRAINEE 7
Y22NN	SCHOLAR
Y23NN	TRAINEE

TAM – New Job Codes added to TAM

Job Opening Details

Favorites ▾ | Main Menu ▾ > Recruiting ▾ > Create Job Opening

Job Opening

Save and Submit | Save as Draft | Notification | Start Over

Job Opening ID NEW	Status 005 Draft
Job Posting Title POSTDOCTORAL FELLOW	Business Unit UWWTW (UW Whitewater)
Job Code X10NN (POSTDOCTORAL FELLOW)	Department W101000 (SA/SR VP/ACADEMIC AFFAIRS)
Job Family 000017 (Postdoctoral)	Primary Recruiting Location 1273 (UW Whitewater)

Job Opening | Job Opening Attachments | Job Opening Attachments Hist

Job Details | Assignments | Job Postings | Screening

Opening Information ?

*Template ID Faculty/Academic Staff/Limited

Job Opening Type Standard Requisition

Created By JOAN SCHLEICHER

Created

*Openings to Fill

Target Openings

Available Openings

Establishment ID

Business Unit UW Whitewater

Company University of Wisconsin System

Department SA/SR VP/ACADEMIC AFFAIRS

Underutilized (AA Goals): Job Group UWEX-CE Program Area

*Empl Class

Status Code 005 Draft

Status Reason

*Status Date

Desired Start Date

Encumbrance Date

Projected Fill Date

Date Authorized

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

December 2017

12A 12B 12M

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