



## Affinity Group 3

### January 16, 2018

- 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: FSA Unsubstantiated Claims  
ICI Annual Review Timeline  
Wellness Incentive  
Security Role Removal
- PY: SL Earned on January A  
Check Distribution  
Nonstandard Processing Schedule  
Key Year-End Payroll Dates  
Calendar Review
- Institutional Feedback

# FSA Unsubstantiated Claims: Next Steps

These slides serve as a reminder to institutions that payroll will be withheld from employees with unsubstantiated claims based on a list expected to be provided by TASC by 1/16/17.

## Communication of Unsubstantiated Claims:

Employees received communication about their unsubstantiated claims at the following times:

<b>Initial Notices</b>	1 day, 15 days, 30 days after initial TASC Card transaction; TASC Card deactivated after 45 days.
<b>TASC Emails</b>	November 17, November 27, December 5, December 12, December 19
<b>TASC Mailers</b>	November 17, December 5, December 19
<b>UW System Emails</b>	November 27, December 12, December 19

Employees will also receive an email from UW System later this week or early next week notifying them that they will have a deduction.

# FSA Unsubstantiated Claims: Next Steps

## Resolving Unsubstantiated Claims:

Employees can still resolve unsubstantiated claims through the run-out period (January 1<sup>st</sup> through March 31<sup>st</sup>).

If an employee substantiates a claim during the run-out period, the employee will need to work with TASC to receive a refund. The Service Center will not be refunding deductions through payroll.

There may still be benefits for employees wishing to substantiate claims during the run-out period:

- As plan corrections or offsets are made, additional funds may become available for the participant's use.
- These additional funds can be used to reimburse the participant for eligible expenses incurred during the applicable plan year, and may also be applied to the annual carryover limit (up to \$500).

# FSA Unsubstantiated Claims: Next Steps

To resolve an unsubstantiated claim, employees may still:

<b>Substantiate</b>	Employees will need to submit a Plan Correction Request Form, selecting “Substantiate Claim” with all of the requested receipt information.
<b>Substitute</b>	Employees will need to submit a Plan Correction Request Form, selecting “Replacement Receipts” with all of the requested receipt information.  <b>Please note:</b> Replacement receipts cannot include any previously reimbursed expenses and must also be for a purchase within the applicable plan year (January 1 to December 31, 2017)
<b>Repay</b>	Employees must complete the Plan Correction Request Form, selecting “Repayment” with a check or money order, if applicable.  <b>Please note:</b> If the claim is also repaid via payroll withholding, the participant will receive a refund.

**Please contact TASC for more information:**

844-786-3947 or 608-316-2408

[1customercare@tasconline.com](mailto:1customercare@tasconline.com)

## Payroll Withholding

- Balances at or under \$100.00  
The balance will be taken out of one paycheck (bi-weekly or monthly).
- Balances at or over \$100.01  
The balance will be divided into even deduction amounts per pay period until the end of the run-out period.

If you have an employee with a hardship, please contact UW System Human Resources at [uwshr@uwsa.edu](mailto:uwshr@uwsa.edu)

# FSA Unsubstantiated Claims: Next Steps

## 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:**

If an employee fully substantiates their 2017 claims during the run-out period and after a payroll deduction has occurred, the employee must work with TASC for a refund on the deduction and TASC will communicate with the Service Center to end deductions going forward, as applicable.

## Unsubstantiated Claims

As of Thursday, December 21, 2017, there are 698 participants with a total of \$164,811.69 in unsubstantiated claims.

- 337 at or under \$100.00
- 142 between \$100.01 and \$250.00
- 139 between \$250.01 and \$499.99
- 80 at or above \$500.00

We will be receiving an updated report later today that will be used to process payroll withholding.



# FSA Unsubstantiated Claims: Next Steps

## Contact TASC

Employees should contact TASC with questions regarding their account, how to resolve a claim, etc.

## TASC Customer Care

844-786-3947 or 608-316-2408

[1customercare@tasconline.com](mailto:1customercare@tasconline.com)

# Questions



# ICI Timeline

- **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
- **March 1, 2018** – Employee deadline to submit paper application for Deferred or Supplemental enrollment into ICI
- **March 31 – April 1, 2018** – UWSC will be updating Job Data to provide election entry for Deferred or Supplemental enrollment into ICI

# What is ICI deferred enrollment?

An opportunity to enroll into University Staff ICI benefit plan for the first time if:

- Sick leave balances are as of December B (pay period end 12/23/2017) :

ICI Category	Sick Leave Hours
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

\*\*Prorated based on FTE or sick leave earned

# What is ICI deferred enrollment?

An opportunity to enroll into ICI every year if you have obtained 1040 hours or more by December B or December Monthly.

Deferred enrollment opportunity for:

## ICI Category

**University Staff - Category 6**

## Sick Leave Hours

> 1040 Life to date balance

## ICI Category

**FA/AS/LI – 180 Days**

## Sick Leave Hours

> 1040 Life to date balance

# ICI References

## Employee References:

- <https://www.wisconsin.edu/ohrwd/benefits/dis/ici/>

## Administrator References:

- [ICI Administrator Landing page](#)
  - A list of KB resources
  - Links to UWSA and UWMSN Policy are available

# Wellness Incentive

Employees and spouses enrolled in the State Group Health Insurance program are eligible for an annual \$150 Wellness Incentive.

- **2018:** In addition to completing the health screening and health assessment, a Well-Being Activity will be necessary to earn the incentive. A few examples of Well-Being Activities are:
  - Million Steps Challenge
  - 21 Day Meditation Experience
  - Self-Directed Coaching
  - Daily Dash
- **2019:** Providing a premium differential instead of a gift card will continue to be explored by the Department of Employee Trust Funds (ETF); however, will **not** take place for 2019.

For more information, visit [wellwisconsin.staywell.com](http://wellwisconsin.staywell.com) or contact the StayWell HelpLine at 800-821-6591. The ETF Employer Bulletin may be found at [etf.wi.gov/employers/bulletins\\_all/eba20180104.pdf](http://etf.wi.gov/employers/bulletins_all/eba20180104.pdf).

# Security Role Removal

- **BN Benefits Report Manager** security role is being removed since the role is no longer needed.
- The following roles will provide the necessary access:
  - BN Benefits View
  - BN Benefits Campus Update



# Questions



# SL Earned on January A

- SL Earned reflected on January A earnings statement lists hours earned in 2018 (2.5 hours earned from 1/1-1/6/18 for 1.0 FTE)
- Increase in balance reflects full earnings when compared to balance on December B statement

University of Wisconsin System  
660 W WASHINGTON AVE STE 201  
MADISON, WI 53703-4703

Pay Group:	HPR	Pay Begin Date:	12/10/2017
Business Unit:	UWSYS	Pay End Date:	12/23/2017
		Payment Date:	01/04/2018

Leave Balances

Leave Type	Beg Earn Balance	Earned	Used/Adj	Ending Earned Balance	Available Balance
Vacation	4.04	8.31	0.00	12.35	16.50
Sick	2230.10	5.00	0.00	2235.10	2235.10
Sick-YTD	0.00	0.00	0.00	127.50	0.00
Sabbatical	1200.00	0.00	0.00	1200.00	1200.00
Legal-Holiday	-12.00	0.00	-4.00	-16.00	8.00

University of Wisconsin System  
660 W WASHINGTON AVE STE 201  
MADISON, WI 53703-4703

Pay Group:	HPR	Pay Begin Date:	12/24/2017
Business Unit:	UWSYS	Pay End Date:	01/06/2018
		Payment Date:	01/18/2018

Leave Balances

Leave Type	Beg Earn Balance	Earned	Used/Adj	Ending Earned Balance	Available Balance
Vacation	0.00	4.14	0.00	4.14	216.00
Vacation-Carryover	0.00	0.00	0.50	0.50	0.50
Sick	2237.60	2.50	0.00	2240.10	2240.10
Sick-YTD	0.00	0.00	0.00	2.50	0.00
Sabbatical	1200.00	0.00	0.00	1200.00	1200.00
Pers-Holiday	0.00	0.00	36.00	36.00	36.00
Legal-Holiday	0.00	8.00	-8.00	0.00	64.00

# Check Distribution

- Paper checks will no longer be routed to campuses as of February 1, 2018
- First payrolls impacted:
  - January Monthly
  - January B Biweekly
- Institution-specific ACH forms will be included in upcoming check mailing
- Please provide a link to your AG

## **2018UNC01:**

- 1/12 – Paysheet Create (overnight) (Fri)
- 1/17 – Payline Request Deadline (4:30 pm) (Wed)
- 1/17 – Payline & Retro Load (overnight) (Wed)
- 1/17 – FICA Deadline (noon) (Wed)
- 1/19 – Final Cal & Confirm (noon) (Fri)

# Questions



# 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

February 2018



Today

1A 1B 1M



January 2018

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

View in Table



# Institutional Feedback

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

# 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](mailto:ag1@uwsa.edu)

AG2: [ag2@uwsa.edu](mailto:ag2@uwsa.edu)

AG3: [ag3@uwsa.edu](mailto: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*