



Affinity Group 3

January 23, 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: ICI Annual Review
- PD: Learning Path Courses
SOD Training
- PY: 2017 Lost Leave
Paycheck Modeler
Check Distribution
Tax Update 2018
Key Year-End Payroll Dates
Calendar Review
- Institutional Feedback

ICI Timeline

- **January 19, 2018** – Email went out to employees regarding Deferred and Supplemental enrollment opportunity
- **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

ICI Lookup Tool



ICI Annual Review

Timeline

Calendar

Lookup Tools

Resources

Admin Look-Up Tools to view Employee ICI Notices

When activated, these tools will assist you to help employees understand their ICI notices.

2018 ICI Premium Update Notice

Communication planned (February date TBD)

Employee Empl ID:

Submit

2018 ICI Annual Deferred Enrollment Notice

Communication planned January 16-19, 2018

Employee Empl ID:

00000000

Submit

ICI Deferred Enrollment Message

ICI Deferred Enrollment Opportunity



University Staff Income Continuation Insurance - Supplemental Coverage

Enrollment Deadline: March 1, 2018

Coverage Effective Date: April 1, 2018

Since you are currently enrolled in Standard Income Continuation Insurance (ICI) coverage, and your 2017 WRS earnings were more than \$64,000, you are eligible to enroll in Supplemental ICI coverage during the current Annual Deferred Enrollment opportunity. Standard ICI pays up to 75% of your gross salary up to a maximum of \$4,000 per month (based on a maximum salary of up to \$64,000 per year of WRS earnings). Supplemental ICI would pay up to 75% of your gross salary up to a maximum of \$7,500 per month (based on a maximum salary of up to \$120,000 per year of WRS earnings).

Sick leave balance: 1,775.300000

Your Classified ICI Category: 6

Your current estimated monthly salary: \$6,250.00

	Premium
Your estimated standard monthly premium, without supplemental coverage:	\$0.00
Your estimated supplemental monthly premium, if you elect coverage:	\$6.36
Your estimated total monthly premium, if you elect to add supplemental coverage:	\$6.36

To Enroll: Complete the [online application](#). When completing the application, check the "Supplemental Coverage" box only. Submit it to your human resources office by March 1, 2018.

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

Questions



Learning Path Courses

- The Professional Development Team will begin rolling out new Learning Path courses
 - If an employee has a Security Role that indicates he/she should complete a class, the class will appear on his/her personal learning path (security granted since July 1, 2017)
 - HR Directors will be notified of class schedule and employees that will be offered registration
 - Email communication to register will then be sent directly to the employee

Learning Path Courses

- Payroll – March 2, 2018 @ UW-Milwaukee
 - Setting Up a Person in Payroll (AM)
 - Add'l Pay (PM)
 - More payroll offerings will be scheduled in March/April
- Finance – Remote courses
 - Setting Up Funding
 - March 9 – AM
 - March 19 – AM
 - Changing Funding (prerequisite – Setting Up Funding)
 - March 9 – PM
 - March 19 – PM
 - Direct Retro (prerequisite – Setting Up & Changing Funding)
 - March 23 – AM

Separation of Duties Training Rollout Plan

- Begin late February/early March
- Offered via Skype for Business or Collaborate
 - One training scheduled per institution (additional for Madison)
 - Three general sessions to ‘catch’ missing staff
 - Coordination between UWSC Professional Development Team and institution HR training contact
 - Listed on Learning Path
- Required for all SOD reviewers and HR Directors
 - Available for other interested parties

Separation of Duties Sessions

- SOD Training
- Discussion of potential ways to minimize / eliminate SOD conflicts at your institution
 - What documentation occurs when an employee is hired, transferred, terminated, EDED extended, etc.?
 - Where is the documentation stored?
 - How do we validate?
 - What can we (institution) do to reduce SOD conflicts?
- Discussion of the draft standard “hire” process – planned to minimize conflicts
- Questions?

Domestic Tax for Foreign Nationals

- Workshop – save the date!
 - Tuesday, February 27, 1:00 p.m.
 - Presented via Blackboard Collaborate
- Agenda
 - Using the Glacier Workbook
 - Examples
 - Feedback session – what does centralization of domestic tax for foreign nationals look like?

Questions



2017 Lost Leave Policy Reminder

- According to policy, requests to change the leave type originally used to another type of leave must be received by the institution by the end of the calendar year in which the absence occurred. This is commonly called “leave swap”.
- Leave swap is done to avoid loss of leave that has no carryover provisions. As of 12/31/17 (13A), any remaining Vacation Carryover, Personal Holiday or Legal Holiday balances were lost. Running the Lost Leave Balance report will identify employees that lost leave. If you feel someone lost leave that was in error, please make the correction. Otherwise the lost leave report is for information purposes only.

2017 Lost Leave Report

- Run the Lost Leave Balance Report
<https://kb.wisc.edu/hrs/page.php?id=30516>
- For employees who had adjustments made during the January A processing, you may want to review balances lost in error due to timing issues.
- **Considerations:**
 - Do not add legal holiday hours prior to 2/27/17. This is when Absence took over the legal holidays and they will not process before this date.
 - Employees that transferred from Bi-weekly to Monthly during 2017 may appear on this report; they can be ignored.
 - Part time FTE who worked extra hours during the 13A/1A timeframe earned additional LH hours. If they were not used prior to 12/31 they may have been lost inadvertently.

2017 Lost Leave Report

If errors are identified:

- Leave can be swapped with alternative leave (that has carryover provisions) used between 2/27 and 12/31 to correct the error.
- If there is no alternative leave to “swap” with, the time is lost.
- Managing Absences for a prior pay period (leave swap)
<https://kb.wisc.edu/hrs/page.php?id=16880>
- Once all “swaps” are completed, wait for an absence calc to run, then run a new report to make sure the employee is updated correctly.
- Please correct errors by February 2nd.
- If you need assistance, please let your Affinity Group know.

Questions



Paycheck Modeler

- As HRS is an integrated system, the Paycheck Modeler is designed to consider annualized deductions (FSA / HSA)
- The calendar year end payroll created to assist in annual tax processing is counted as a payroll when calculating annualized deductions
- Therefore, during the period of time that calendar year-end calendars are being used, the paycheck modeler cannot model a check for employees who have an annualized deduction (FSA / HSA) and will return an error message
- Limited availability considerations:
 - When paylines are locked during final calc/confirms & post confirms
 - During heavy CYE processing (December – Mid January). We will notify institutions of this period annually.
 - During brief openings of a CYE calendar (check back)

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

Payroll Tax Update 2018

- **NEW Payroll Tax Provisions have been updated in HRS**
 - Effective for the 1M payroll paid 2/1
 - Payroll withholding rates have generally decreased
 - Supplemental Rates have decreased
 - NRA Gross Up has increased
- **New W4's needed?**
 - Guidance does not suggest retrieving new W4's from all employees at this time. Stay tuned for official IRS guidance.
 - Additional tax reform information will be communicated as it becomes available.

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

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*