UNIVERSITY OF WISCONSIN SYSTEM SERVICE CENTER

Affinity Group 3
May 8, 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

- AM: Comp Time Carryover Payout Reminder
  FA/AS/LI End of Year Reminders
  Absence Event Date Range Entry Change
- BN: Updating Dependent/Beneficiary Page
  COBRA Letter Updates
- FN: Funding Updates
- TAM: Approver Phone Numbers Change
- HR: Verification of Employment (VOE)
- PY: Tax Reform Update
  Check Correction Notification
  Calendar Review
- PD: Upcoming Training
- AG: Time and Absence MSS Dashboard Follow Up
  Institutional Feedback

Comp Time Carryover Payout Reminder

- Deadline to use CT Carryover was April 30
- Unused CT from 2017 must be paid on the May A payroll
- CT Payout is NOT automatic
- Comp Time Leave Balance Report can be used to determine carryover balance (KB-45097)
- Comp Time Payout Instructions can be found in KB-17105
- Policies related to Comp Time:
  - UPS policy: https://www.wisconsin.edu/ohrwd/download/policies/ops/tc3.pdf
  - HRD policy: https://kb.wisc.edu/ohr/policies/page.php?id=53322

FA/AS/LI End of Year Reminders

- Deadline for submission of Monthly Leave Reports is Fiscal Year End (June 30, 2018)
- Leave report entry deadline is July 31, 2018
- Sick Leave Reduction will occur with the August monthly payroll
- Several reports are available to assist with FYE Absence Management:
  - KB-30065: AM - Entering Summer FA/AS/LI Leave Reports (Summer 2017 is included in FY2018)
  - KB-20473: AM - Reviewing FA/AS/LI Missing Leave Reports
  - KB-31541: AM - Negative Allocated Balance Report
  - KB-17670: AM - Payout and Payback
  - KB-30503: AM - Leave Balance Report

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FA/AS/LI End of Year Reminders

- Personal holiday and floating legal holiday balances must be used by the end of the fiscal year (June 30) for FA/AS/LI employees.
- If not used, the hours are lost and cannot be carried over.
- Policy References:
  - UPS Operational Policy BN2: https://www.wisconsin.edu/ohrwd/download/policies/ops/bn2.pdf
  - HRD KB-53500 (Personal and Legal Holidays): https://kb.wisc.edu/ohr/policies/page.php?id=53500
  - HRD KB-53409 (Vacation) https://kb.wisc.edu/ohr/policies/page.php?id=53409

Absence Event Date Range Entry Change

- Absence event date range will be limited to 31 days on all absence pages
- Absence payouts will be limited to a one-day date range
- Warning/Confirmation will display for takes with > 5 day date range
- Leave entry will not allow multiple takes of the same type on the same date on the UWS Absences Page

Questions?

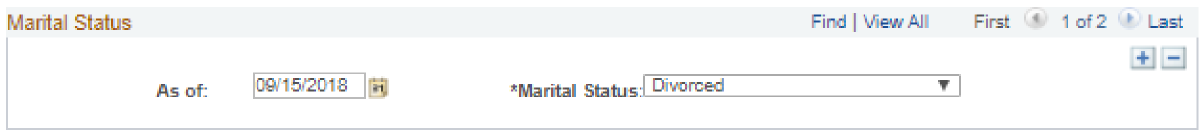
Updating Dependent/Beneficiary Page

- The UWSC Benefits Team has cleaned up the “Relationship to Employee” field in HRS on the Dependent/Beneficiary Information screen for employees.
  - HRS > Main Menu > Benefits > Employee/Dependent Information > Update Dependent/Beneficiary
- When removing coverage, the effective date under the Personal History section should be the effective date of the insurance change, not the actual date of the event.
- The actual date of the event is captured in Benefits Personal Data under the Marital Status section.
  - HRS > Main Menu > Benefits > Employee/Dependent Information > Benefits Personal Data

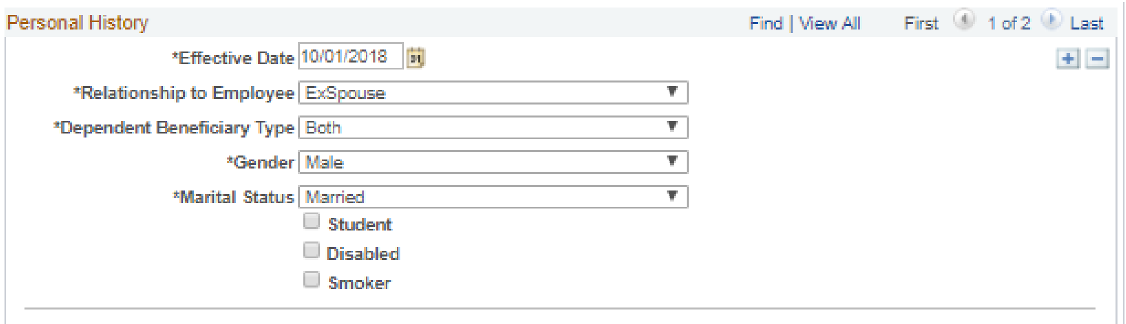
Updating Dep/Ben Page – Marital Change

Example – Divorce 9/15/18, Application received 9/25/18

- Update the Marital Status on the Benefits Personal Data page using effective date of divorce



- Add new row with an Effective Date on the Dependent screen as 10/1/18.



- ADM event with an effective date of 10/1/18, entered on 9/25/18. COBRA Notice is mailed 9/26/2018. The ex-spouse (& any stepchildren) comes off the insurance 10/1/2018.

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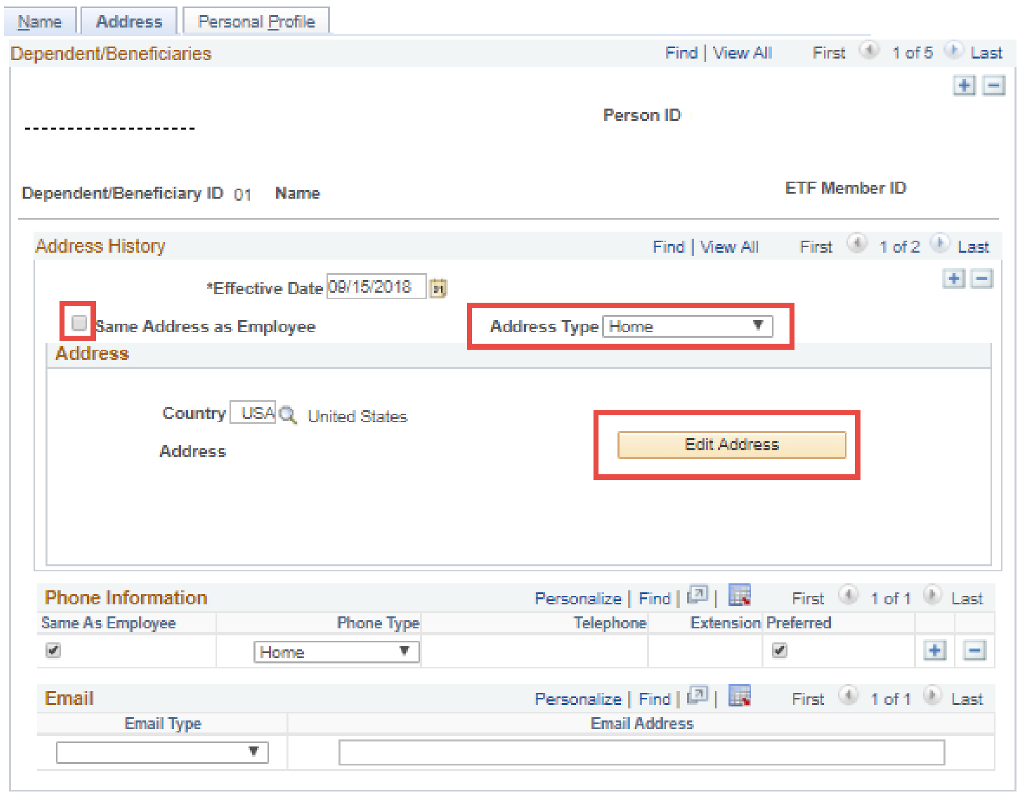
Updating the Dep/Ben screen – Marital Change

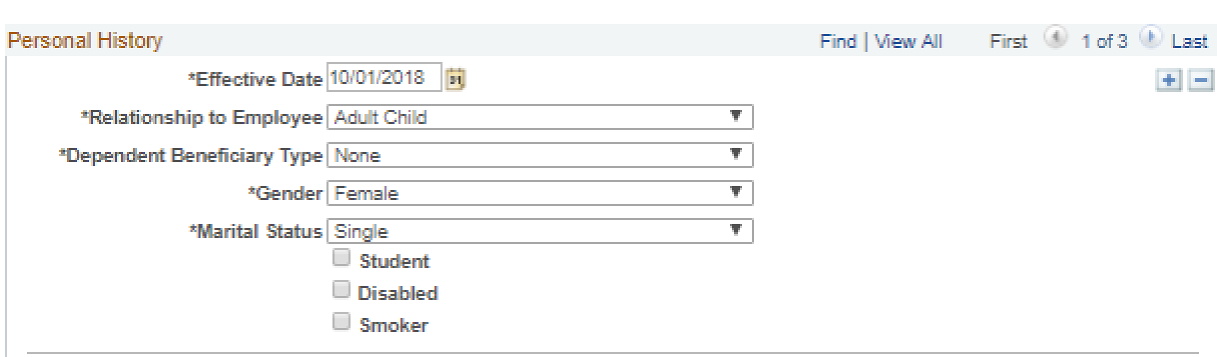
Note: If you have the ex-spouse's address, please update the spouse address on the Update Dependent/Beneficiary screen for the COBRA to be sent directly to them.



Updating Dep/Ben page – Removal of Dependent

Example – Divorce with stepchildren

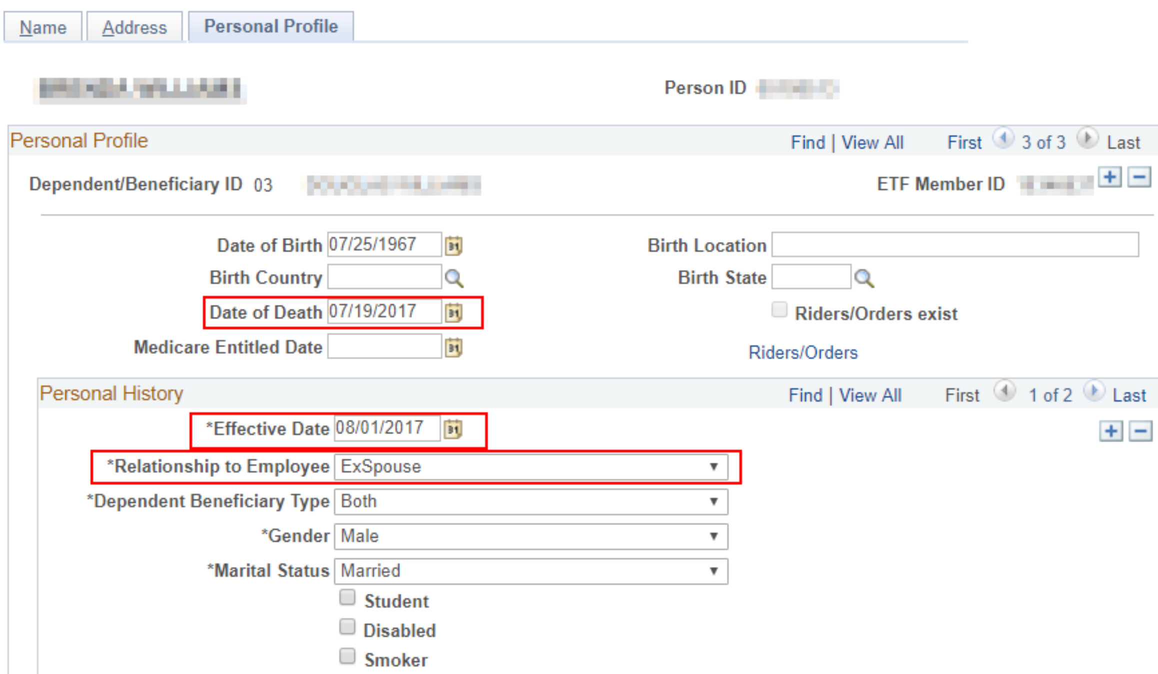
- The stepchildren will come off the employee's insurance the same date as the ex-spouse.
- Add a new row with the Effective Date on the Dependent screen as 10/1/18.
- Change the Relationship to Employee from stepchild to Adult Child.
  - We do not have the option of ex-stepchild. By changing them to Adult Child, this will eliminate the possibility of accidentally adding them back to the employee's insurances in the future.



Updating Dep/Ben page – Death of Dependent

Example – Death of spouse 7/19/2017.

- The deceased spouse is removed end of month of their death. ADM event is created with the effective date of 8/1/17.
- Add a new row with the Effective Date on the Dependent screen as 8/1/17.

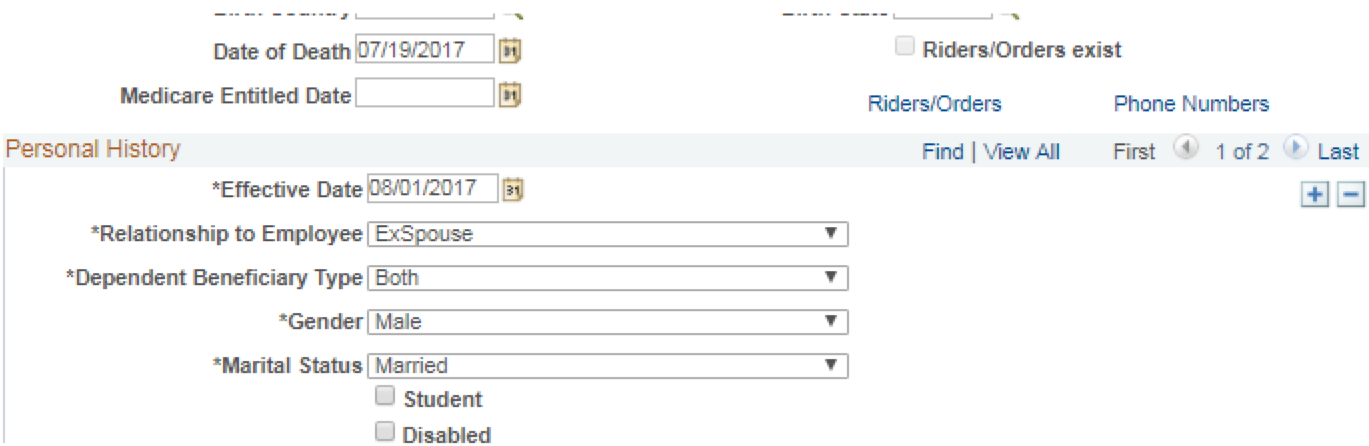


Updating Dep/Ben Page

Note:

- Relationship to Employee changes to ExSpouse.
- Marital Status stays Married.
- Remember to update Benefits Personal Data screen
  - Marital Status for employee is changed to Widowed

The reason we change the Relationship to ExSpouse, is if the employee remarries, they will be able to add the new spouse.



Date of Death 07/19/2017
Riders/Orders exist
Medicare Entitled Date
Riders/Orders
Phone Numbers
Personal History
Find | View All
First 1 of 2 Last
*Effective Date 08/01/2017
*Relationship to Employee ExSpouse
*Dependent Beneficiary Type Both
*Gender Male
*Marital Status Married
Student
Disabled

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COBRA Letter Updates

- Language has been updated for Plan Type 1X (Health), FSA, and Life Plans
- Dynamic text for Retirement and Retirement in Lieu of Layoff will indicate State Group Health and State Group Life will continue through Department of Employee Trust Funds (ETF)
- Service Center phone number changed to (888) 298-0141 in the closing text
- No updates to the third or fourth pages of the letters

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Questions?

Funding Pages Locked

Budget Funding Data Entry and Direct Retro page lockout begins at 4pm on Friday, May 11, for:

- FY2019 funding load from Compensation Administration Tool (CAT)
- Test Rollover of FY2018 funding to FY2019

Funding Data Entry and Direct Retro pages will be available by 9am on Monday, May 14.

Fiscal Year End landing page:
https://uwservice.wisconsin.edu/administration/fye

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CAT & Test Funding Rollover Results

On or before Friday, May 18, institutions will receive Excel files for review:

- CAT to CA load results
- TEST Funding Rollover Errors
  - June 1, 2018: Deadline to correct FY2018 funding entries to avoid Rollover Errors

Fiscal Year End landing page:
https://uwservice.wisconsin.edu/administration/fye

Dept / Position Level Funding Effective Date

Salary funding levels review:

- Employees are typically funded through *Appointment* level funding set up in HRS.
- *Department* and *Position* level funding entries are used as back-up funding sources only when *Appointment* level funding does not exist or does not cover the entire pay period.

Dept / Position Level Funding Effective Date

	Effective Date in Past Years	Effective Date This Year
Department level funding	July 1	Earliest pay period begin date in the new fiscal year at any UW institution – 6/18/2018
Position level funding	July 1	Earliest pay period begin date in the new fiscal year at any UW institution – 6/18/2018

- Allows *Department* or *Position* level funding to be used if *Appointment* level funding is missing for any portion of the 7A and 7M pay periods.
- Date will change every fiscal year. When manually adding or changing *Department* or *Position* level funding for FY 19, the Effective Date must be 6/18/2018 or later.

Dept / Position Level Funding Effective Date

Refer to the Funding Entry Guide on the Fiscal Year End landing page to determine correct Effective Dates for *Appointment* level funding entries.

For more information:

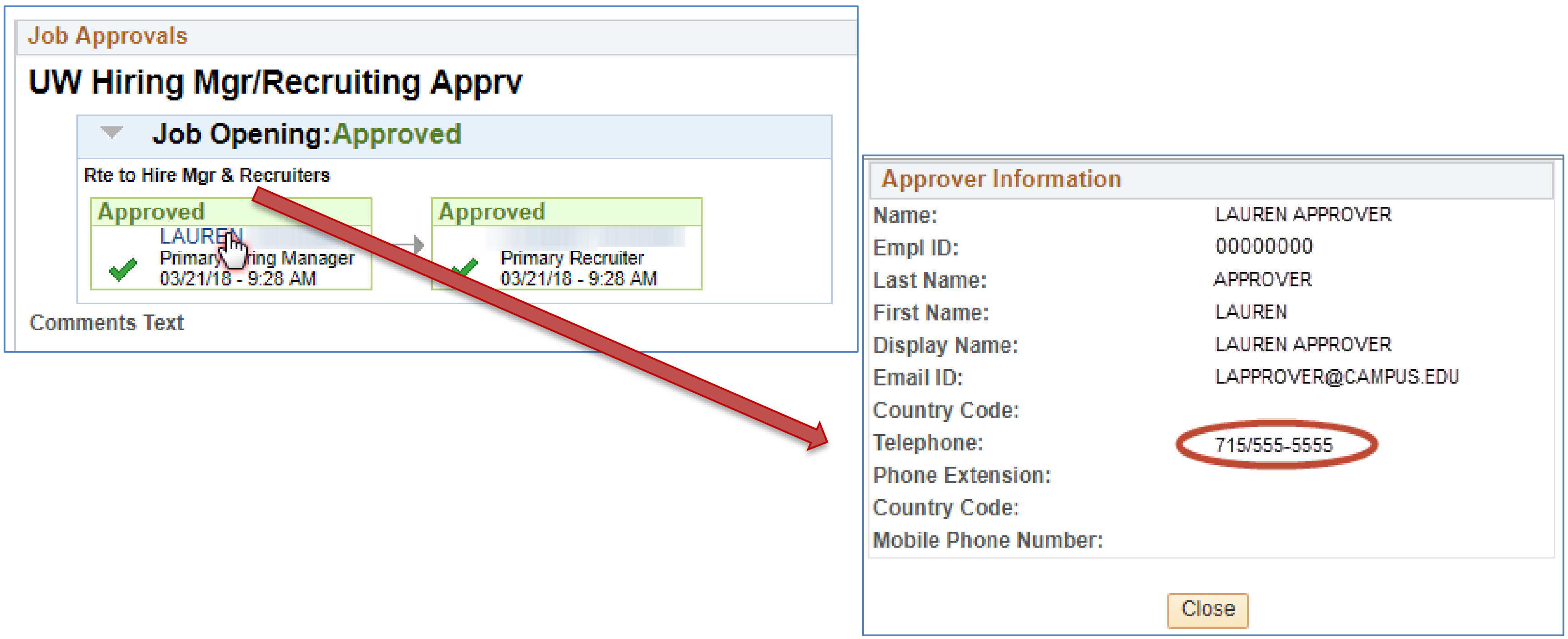
- Fiscal Year End landing page
  https://uwservice.wisconsin.edu/administration/fye
- KB 21728, Add or Change Department Level Funding for an Appointing Department
- KB 24144, Add or Change Position Level Funding for Employee's Salary Expense
- KB 21872, Salary Funding Levels Assigned During Payroll Processing

Questions?

TAM – Approver Phone Numbers – Update

A change has been made to how approvers' phone numbers are displayed within Job Opening and Offer approval workflows.

When viewing the approval chain, TAM users can click names to view an approver's contact information, including a **Telephone** number.



TAM – Approver Phone Numbers - Update

As originally designed by Oracle, HRS populates the number marked Preferred on the approving employee's *Modify a Person* page.

Phone Information — Personalize | Find | View All | First 1-3 of 3 Last

*Phone Type	Telephone	Extension	Preferred		
Home	715/555-5555		✓	+	−
Mobile	262/555-5555		☐	+	−
Business	608/555-5555		☐	+	−

- If a personal number is marked as Preferred, the telephone number will no longer display on the approver pop-up.
- Best practice is to have **Business/Business Other** as Preferred, which will display on the approver pop-up.
- HRS KBs updated to reflect best practice. (Maintain Person Data - Contact Information [KB-17784])
- The same logic will be applied to the approver pop-up within the Time & Labor and Absence modules - Coming soon.

Questions?

Verification of Employment Reminder

- The UWSC is seeing an increase in the amount of contacts seeking information related to Verifications of Employment (VOE)
- If a third party or an employee contacts your HR office seeking a VOE, please direct them to TheWorkNumber.com.
- The UW System's Employer code is 18032.
- https://uwservice.wisconsin.edu/voe/ has all of the information for resolving requests for VOE.
- All requests sent to the UWSC for VOE must include a copy of the information that is available on the Work Number or proof that the information is NOT available on the Work Number website.

Providing this information will expedite the handling of these requests

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Tax Update 2018

- NEW Tax Withholding Rates were implemented in HRS in early February
- New W4's needed?
  - Guidance suggests employees do a "paycheck checkup"
  - IRS Withholding Calculator
    - https://apps.irs.gov/app/withholdingcalculator/
  - Update W4 if applicable
    - https://uwservice.Wisconsin.edu/docs/forms/pay-employee-withholding.pdf
  - View current W4 status:
    - Earning's Statement under Tax Data box
- A document of the guidelines was included with the slides to share with employees

Check Correction Notification

- Effective May 14, Check Correction Approvers will receive notification if they have a check correction awaiting approval
- Notification will be sent on the 7th, 14th and 21st day awaiting approval
- Requests will be cancelled on the 22nd day
- This follows the MPR notification schedule

Questions?

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PY: Calendar Review

Today | 5A | 5B | 5M

May 2018

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

PD: Upcoming Learning Path Courses

- Finance –
  - Setting Up Funding
    - May 9 – PM (remote)
    - June 4 – PM (remote)
  - Changing Funding (prerequisite – Setting Up Funding)
    - May 10 – AM (remote)
    - June 5 – PM (remote)
  - Direct Retro (remote)
    - June 7 – AM (remote)

Time and Absence MSS Dashboard

- The Time and Absence Manager Self Service Dashboard is now available.
- Template message to introduce the dashboard to current MSS Supervisors was sent with the slides.
  - Customize for your institution
  - Supervisors can begin using this new dashboard for the 5A approvals
- Please send feedback on the dashboard to the AGs.

Questions?

Institutional Feedback

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