



## Affinity Group

### October 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: ABE – Rescinding Elections  
ABE – Appeals
- PY: W-2 and 1095-C Electronic Form Consent  
WfAP  
US Bank Focus Pay Cards  
Calendar Review  
Institutional Feedback

# Rescinding Elections

- Employees may ***withdraw/rescind election(s)*** made during ABE by notifying their human resources office by letter or e-mail ***prior to January 1<sup>st</sup>***.
- **Paper Application**
  - Make a photocopy of the paper application and write “RESCIND” across the top
  - Fax the ‘rescind’ application using the Fax Cover Sheet provided
  - File the ‘rescind’ application and the employee’s written request in their benefit file
  - Make entry into HRS: Enter 1/1 ADM event to add back the coverage in effect on 12/31
- **Self Service**
  - Have employee fill out a paper application for the election that was made during ABE, sign, date and write “RESCIND” across the top
  - Fax the ‘rescind’ application using the Fax Cover Sheet provided
  - File the ‘rescind’ application and the employee’s written request in their benefit file
  - Make entry into HRS: Enter 1/1 ADM event to add back the coverage in effect on 12/31
- The ABE election will be rescinded and coverage in effect on December 31<sup>st</sup> will be reinstated.

# Annual Benefits Enrollment (ABE) Appeals

There are separate appeals processes for State Group Health Insurance, the Supplemental Plans, FSA and HSA.

- The following situations may be appealed:
  - Failed to enroll or change plan
  - Failed to change coverage level (e.g., single to family or family to single)

*A late enrollment appeal and submission of an application does not guarantee approval.*

***Neglecting to take action during ABE is not a basis for appeal.***

**Appeals and supporting documentation must be submitted to the Service Center by January 31, 2019 to ensure they will be reviewed**

# ABE Appeals Process

- Employee submits a written request (letter or email) and a **State Group Health Opt-Out Incentive, State Group Health Insurance, Delta Dental** and/or **VSP** application to their institution indicating the facts/circumstances regarding the reason their application(s) is being submitted late and the remedy being sought
- Institution: Employer statement with pertinent facts that either supports or does not support the employee's request
- Institution: Fax application, employee letter and employer statement using the Fax Cover Sheet provided
- Service Center: Notify institution of decision
- Service Center: Enter enrollment/change in HRS (if applicable)

# FSA & HSA Appeals Process

TASC Appeals Department will require supportive proof for all **FSA and HSA** appeals. Late enrollment appeals will be denied unless allowable circumstances are encountered, such as:

- Administrative Error/Issue:
  - Employer provided incorrect guidance on the ABE deadline date.
  - Employee experienced system issue during enrollment, such as a system glitch that caused the enrollment not to take.
- Employee Enrollment Error:
  - Example: Employee enrolled in Dependent Day Care FSA, but does not have any eligible dependents. Meant to enroll in Health Care FSA.

***TASC Appeals Department will require supportive proof for all appeals. Review fax cover sheet for acceptable documents. All documentation should be submitted together.***

# FSA & HSA Appeals Process, cont.

- Employee: Complete a **TASC Late Enrollment Request Form** and submit the form as well as an **FSA or HSA** application to their institution
- Institution: Employer statement with pertinent facts that either supports or does not support the employee's request
- Institution: Fax application, TASC Late Enrollment Appeal Form, proof and employer statement using the Fax Cover Sheet provided
- TASC: Notify Employee and UWSC by email of approval or denial
- Service Center: Notify institution of decision
- Service Center: Enter enrollment/change in HRS (if applicable)

# Where to Send Appeals

Fax materials using Fax Cover Sheet  
on landing page (coming soon)

## Reminder:

**Appeals and supporting  
documentation must be submitted to  
the Service Center by January 31, 2019  
to ensure they will be reviewed.**



# Questions?



## The W-2 and 1095-C Electronic-only Distribution Option

- Beginning **November 5, 2018**, UW employees have the option of receiving their W-2/1095-C forms **electronically only**, eliminating the paper forms formerly distributed to them each January via U.S. mail.
- To choose electronic-only distribution of the W-2 and 1095-C forms, employees are required to complete a Consent form for both the W-2 form and the 1095-C form. The 1095-C consent form must be submitted **by January 11, 2019**. The W-2 consent form must be submitted **by January 18, 2019**.
- Employees who do not complete the Consent form, will continue to have their forms mailed to them via U.S. mail.
- An employee who consents to electronic-only distribution may subsequently withdraw consent.
- Employees who have terminated employment will receive paper W-2 and 1095-C forms mailed to them via U.S. mail.

## **Benefits of Electronic-Only W-2 and 1095-C Form Distribution**

- Most secure method of tax form delivery. Mailed tax forms have a higher risk of being lost or stolen.
- Earlier access as electronic forms are available earlier than mailed paper forms.
- The convenience of downloading electronic tax forms directly into many tax preparation software programs.
- Reduced administrative costs of generating W-2 and 1095-C forms.
- Environmentally friendly.

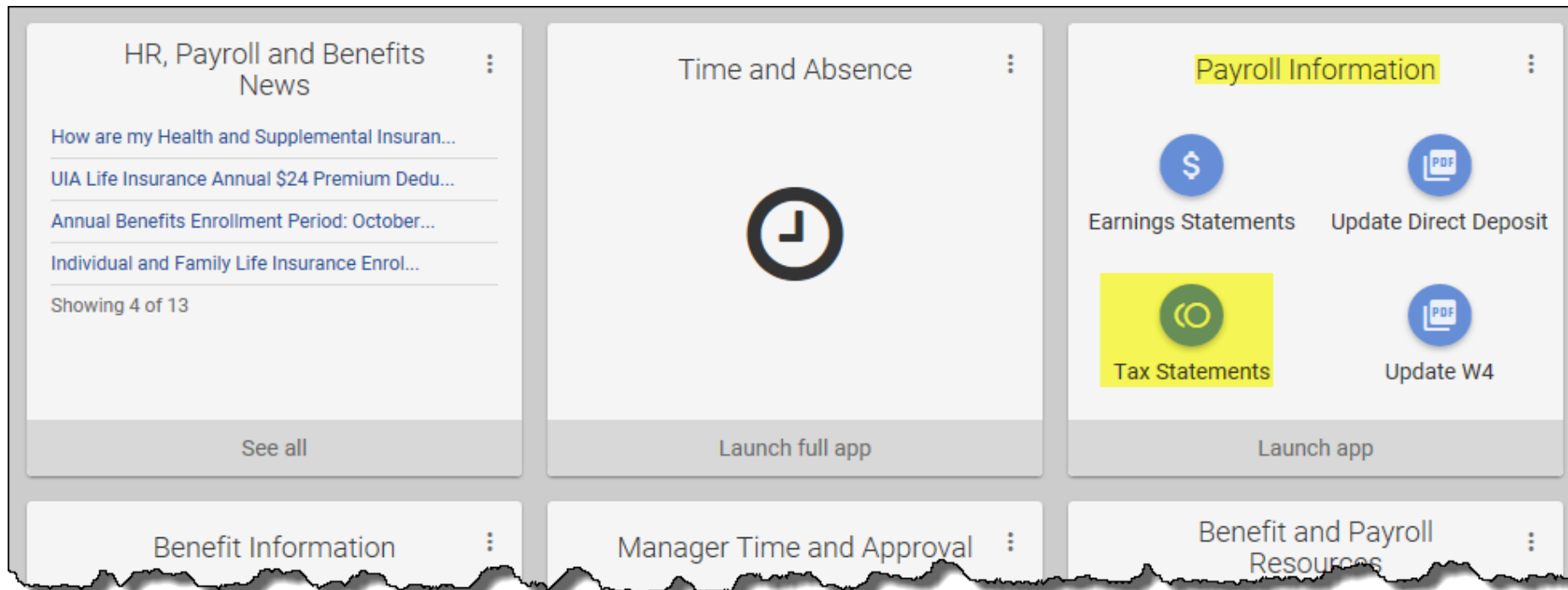
## Communication for the Consent Option

- An email is scheduled for distribution to UW employees the weekend of November 2-4 to inform them of the consent option available to them on Monday, November 5. Instructions for accessing the consent form, and completing it, will be included in the email.
- Campus administrators will receive an advance copy of the employee email.
- Within 24 hours, a confirmation email message will be sent to employees who complete the consent form, or who may subsequently withdraw consent. Employees who choose electronic-only distribution will also receive an email notification no later than January 31, 2019 alerting them to the electronic availability of their W-2 and 1095-C forms.
- A portal article will be posted to give employees a preview and advance information about the consent option.
- Annually, each fall, a consent email will be sent to all UW employees to offer this option to new employees, and as a reminder to employees who did not choose consent initially.

# W-2/1095-C Form Electronic-only Consent

## Navigation and Instructions for Completing Consent form

- Log into the MyUW Portal
- On the Payroll Information Tile select the Tax Statements button



# W-2/1095-C Form Electronic-only Consent

## Navigation and Instructions for Completing Consent form

- On the Tax Statements page, choose the “W-2 Consent” and/or “1095-C Consent” button

Earning Statements

**Tax Statements**

View W-2

Consent to receive W-2 electronically

View 1095-C

Consent to receive 1095-C electronically

Year ▼ Statement

W-2 Explanation

1042-S Explanation

1095-C Explanation

ACA Information

**Service notice:** This app may be offline on Sundays, 6-10 a.m. for routine maintenance.

# W-2 Consent

- Instructions Provided
- Check the “I consent...” checkbox
- Choose the “Submit” button

The screenshot shows the 'W-2/W-2c Consent' page within the 'Employee Self Service' portal. The page title is 'W-2/W-2c Consent' and it is located under the 'Payroll' section. The left sidebar contains navigation options: 'Paychecks', 'Tax Withholding', 'W-2/W-2c Consent' (highlighted), and 'Direct Deposit'. The main content area includes the following text:

**W-2/W-2c Consent**

You currently receive W-2 or W-2c paper forms by mail

To give your consent for electronic-only distribution of your W-2 form and any W-2c forms you may receive, check the checkbox below. If you consent to electronic-only distribution, you will not be sent a paper copy of these forms from the University of Wisconsin.

You will have electronic access to your forms on the W-2 Employee Self Service page. Due to security restrictions, you will only be able to access your forms from a secure University of Wisconsin network. You will be required to complete security questions to verify your identity.

You may print copies of your forms directly from the W-2 Employee Self Service page. You may also request printed copies from your payroll office. Requesting a printed copy is not considered a withdrawal of your consent. Since a printed copy of your W-2/W-2c form will include your Social Security number, use extreme caution when printing this document in a public place such as your work environment.

If you terminate employment, you will no longer have access to the W-2 Employee Self Service page. Future W-2 or W-2c forms will be sent to your mailing address.

This consent will last until you withdraw it. You may withdraw your consent at any time.

I consent to receive W-2 or W-2c forms electronically

**Submit**

# 1095-C Consent

- Instructions Provided
- Check the “I consent...” checkbox
- Choose the “Submit” button

The screenshot shows the 'Benefit Details' page in the MyUW Portal. The left sidebar contains navigation links: Home, Benefits Summary, Life Events, Dependent/Beneficiary Info, Benefits Enrollment, Affordable Care Act, View Form 1095-C, and Form 1095-C Consent (highlighted in green). The main content area is titled 'Form 1095-C Consent' and contains the following text:

**Form 1095-C Consent**

You currently receive Form 1095-C paper statements by mail

You must complete this Consent Form to receive an electronic copy of Form 1095-C Employer-Provided Health Insurance Offer and Coverage. If you do not submit a Consent Form, the University of Wisconsin (UW) System will process your Form 1095-C based on the most recent information/address you have provided.

To update your address log into the MyUW Portal. Once logged in, click Launch full app on the Personal Information module. On the Personal Information screen click Update My Personal Information. On the Addresses screen click the drop down (->) to get a pop up to enter your new address.

Once you submit the Consent Form, it will remain valid until you submit a Withdrawal of Consent Form. If your employment is terminated or the UW stops providing electronic access to forms, a paper form will be provided.

You will need to have a PDF viewer to access and print your Form 1095-C.

If you have any questions, please contact the UW System Service Center: Phone: (888) 298-0141 or (608) 262-0600 (7:45 a.m. - 4:30 p.m., Monday-Friday) or email [servicecenter@uwsa.edu](mailto:servicecenter@uwsa.edu).

I consent to receive Form 1095-C electronically

**Submit**



# Questions?



# Workflow for Additional Pay

New queries have been developed to support the workflow for additional pay process:

- Pending Approvals Query:
  - UW\_PY\_WFAP\_PENDING\_APPROVALS
- Current Approvers Query:
  - UW\_PY\_WFAP\_CURRENT\_DEPT\_APPROV
- Insufficient Approvers Query
  - UW\_PY\_WFAP\_INSUFFICIENT\_APPROVERS
- Navigation for all queries: Reporting Tools > Query > Query Viewer
- See KB-86904: PY – Workflow for Additional Pay Queries for details

# Workflow for Additional Pay

Update on recent issues:

- Missing employee name on additional pay request and approval record – name source has been updated to display name of future hire records
- Final Approval emails will be limited to the enterer of the request and no longer copy the approvers
- If employee is erroneously listed as their own “Reports To,” they will not be able to approve a request on their own behalf
- Additional Pay request will be available to enter and approve for future-dated hires
- Still working on a resolution for additional pay requests for which approvers are receiving the pending approval email, but are unavailable to approve

# Workflow for Additional Pay

## Reminder:

- The Service Center is unable to make updates to your additional pay requests. If a change is needed,
  - And not fully approved, have request denied and use correct history to edit the request
  - And has been fully approved, add one day to the effective date and reuse the earnings code and sequence number to override the previous (erroneous) request
  - And has been fully approved and the incorrect amount has been loaded to the payline, add one day to the effective date, reuse earnings code & sequence number and submit a ticket to have the original request removed from the existing payline

## Resources:

- WfAP Readiness Page:

<https://uwservice.wisconsin.edu/hrs/project-readiness#workflow-for-additional-pay-wfap-tab>

# Questions?



# Focus Pay Card

- For employees who need a replacement card:
  - Phone is preferred to the US Bank call center

**1-877-474-0010**

- Employees should include the following information when requesting a replacement card:
  - Work for University of Wisconsin
  - Need replacement of the personalized Focus Card
  - Whether the card has been activated
- It takes 7-10 days to mail a replacement card – or employee can pay to have it expedited.

# Focus Pay Card

- An FAQ for administrators is on the Payroll Administration page or at this link:

<https://uwservice.wisconsin.edu/docs/publications/payroll-faq-focus-pay-card.pdf>

- An employee FAQ is on the Payroll Administration page or at this link:

<https://uwservice.wisconsin.edu/docs/publications/pay-focus-card-faq-employee.pdf>

- If you have additional questions you would like addressed following this call, please submit a Wisclt.

# Questions?





# PY Calendar Review

September 2018

November 2018

←		Today	October 2018				9A	9B	9C	9M	→	
Sun	Mon	Tue	Wed	Thu	Fri	Sat						
30	1 [9C] Payroll and Benefit Retro and Payline Load [9M] Pay Date [10M] Pay Period Begin [9C] 3rd Batch Prelim Calc	2 [9C] 4th Batch Prelim Calc [9C] FICA Deadline	3 [9C] Confirmation Deadline (Eve) [9C] Final Calc	4	5	6						
7	8 Columbus Day [Federal Reserve Bank Holiday]	9	10	11 [9C] Pay Date	12	13 [10A] Pay Period End						
14 [10A] 1st Batch Prelim Calc [10B] Pay Period Begin	15 [10A] 2nd Batch Prelim Calc	16 [10A] Payroll and Benefit Retro and Payline Load [10A] 3rd Batch Prelim Calc	17 [10A] FICA Deadline [10A] 4th Batch Prelim Calc	18 [10A] Final Calc [10A] Confirmation Deadline (Eve)	19 [10M] 1st Batch Prelim Calc	20						
21 [10M] 2nd Batch Prelim Calc	22 [10M] 3rd Batch Prelim Calc	23 [10M] 4th Batch Prelim Calc [10M] Payroll and Benefit Retro and Payline Load	24 [10M] 5th Batch Prelim Calc [10M] FICA Deadline	25 [10A] Pay Date [10M] Final Calc [10M] Confirmation Deadline (Eve)	26	27 [10B] Pay Period End						
28 [10B] 1st Batch Prelim Calc [11A] Pay Period Begin	29 [10B] 2nd Batch Prelim Calc	30 [10B] 3rd Batch Prelim Calc [10B] Payroll and Benefit Retro and Payline Load	31 [10M] Pay Period End [10B] 4th Batch Prelim Calc [10B] FICA Deadline	1	2	3						

# Institutional Feedback