



Affinity Group

November 6, 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: Wellness Incentive – Taxable Income
ABE: Extended Enrollment/Appeals
- HR: Legacy Person Search Security Roles Update
- AM: Banked Leave Eligibility
Sick Leave Adjustment
- TL: Daylight Savings Time Adjustment
- PY: Illinois Taxation
Nonstandard Processing Schedule
Important Year-End Payroll Dates
- Comm: UW Portal Articles
Upcoming Trainings
Calendar Review
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Wellness Incentive – Taxable Income



The \$150 Well Wisconsin Incentive is a fringe benefit; therefore, it is considered taxable income. The Department of Employee Trust Funds (ETF) sends reports to the UW twice a year to notify us of employees who have received the incentive.

The payrolls that employees will be taxed on are as follows:

August Report –

- Biweekly (8B): August 30th
- Monthly (8M): August 31st

November Report –

- Biweekly (11B): December 6th
- Monthly (11M): November 30th

A report of employees who will be taxed as well as an email template to assist institutions with employee communications will be provided.

Questions should be directed to StayWell at wellwisconsin@staywell.com or to the health plan carriers (some health plan carriers offer incentive programs in addition to the \$150 Well Wisconsin Incentive). The report will have a code that indicates the incentive source – StayWell or health plan carrier.

ABE: Extended Open Enrollment

- **VSP Vision Insurance** has extended their open enrollment until 11/09/2018 at 4:30 pm.
- **Delta Dental** has extended their open enrollment until 12/28/2018 at 4:30 pm.
- Paper applications must be submitted by the employee on or before the new deadline. All enrollments are entered through a 1/1/2019 ADM event with enrollment reason of 'Change Benefit Plan' and 'It's Your Choice Enrollment'.

ABE: Appeals

- **State Group Health, Flexible Spending Accounts/Health Savings Accounts** late enrollments continue to be submitted as appeals.
- **VSP Vision Insurance** enrollments submitted after 11/09/2018 will be appeals.
- **Delta Dental** enrollments submitted after 12/28/2018 will be appeals.

Legacy Person Search Security Roles

- The following security roles will include access to the new Legacy Person Search page in HRS:

UW_UNV_HR_ADMINISTRATOR

UW_UNV_HR_MNGHIRE_RECRUITING

UW_UNV_HR_CON_EMP_INFO_UPD

UW_UNV_HR_TBH_ADMIN_APPR_UPD

UW_UNV_HR_ETHNICITY_MOD_PER_UP

UW_UNV_HR_PERSON_UPD

UW_UNV_HR_STUDENT_HELP_UPD

- **Legacy Person Search View Only Access in HRS:**

UW_UNV_HR_VIEW

UW_UNV_HR_PERSON_VIEW

Questions?



Banked Leave Eligibility – Univ Staff

University Staff Employees eligibility to bank unused vacation is based on the following:

- Years of Service, FTE & FLSA Status
- or
- Vacation Accrual Rate and SL Accumulation

University Staff Paid Leave Banking Schedule		
Years of Service	Full-Time University Staff – Nonexempt	Full-Time University Staff – Exempt and Nonexempt Supervisors
First 5 Years	0 hours	0 hours
5+ to 10 Years	0 hours	40 hours
10+ to 15 Years	40 hours	40 hours
15+ to 20 Years	40 hours	80 hours
20+ to 25 Years	80 hours	120 hours
25+ Years	120 hours	120 hours
Earn < 160 hrs of vacation & have accrued at least 520 hrs of sick leave	40 hours	40 hours

Banked Leave Entry

- Entry for Banked Leave and cash payments must be dated and processed between 12/1 and 12/31. Entries dated and processed prior to the December A payroll confirmation will be paid on 12/20/18 (last check of the year).
- Entry dated and processed after December A will be paid on either the 1/3/19 or 1/17/19 paycheck according to the dated entry.
- It is **not** required that cash payments be included in the last paycheck of the calendar year.
- If no option is selected before the end of the calendar year, remaining annual leave will become carry-over. Forms received after 12/31/18 must be rejected.
- **Entry must be done prior to the absence deadline for the January A confirm (1/9/19)**

Best Practice Considerations:

- use a Saturday or Sunday date to avoid conflicts with Time & Labor
- avoid entry between 12/23 and 12/31
(This is the slice of the 13A/1A period and processing is inherently more complicated.)

Banked Leave Resources

- Eligibility Spreadsheets and supporting documentation will be routed to Institutions before the next AG Call.
- KB References:
 - Entering Conversion of Vacation to Banked Leave for University Staff (KB-20161)
 - Entering Banked Leave Conversion through Employee Self-Service (KB-57367)
 - Running the Banked Leave Annual Eligibility/Election Summary Report (KB-31858)
- Related policies:
 - UPS Operational Policy: BN 1 - <https://www.wisconsin.edu/ohrwd/download/policies/ops/bn1.pdf>.
 - HRD (MSN employees): <https://kb.wisc.edu/ohr/policies/page.php?id=53409>
- Blank Annual Leave Conversion Form:
 - <https://uwservice.wisc.edu/docs/forms/leave-conversion.pdf>

Sick Leave Adjustment

Effective 11/4 there will be 4 additional new takes visible to payroll coordinators.

<u>Element name</u>	<u>Description</u>
UWS_C_SL_ZERO take	SL Balance to Zero (CLS)
UWS_U_SL_ZERO take	SL Balance to Zero (UNC)

- These takes are not visible in ESS or MSS
- These takes are designed to help with SL Certification which is handled at the Service Center
- These takes will be visible in both the Accumulator tab and the Supporting Elements tab in Results by Calendar if a SL Certification has been processed
- Please do not use these takes

Legal Holiday Reduction

Element name

Description

- UWS C LH RED TAKE Legal Holiday Reduction (CLS)
 - UWS U LH RED TAKE Legal Holiday Reduction (UNC)
-
- These takes are designed to remove Legal Holiday *entitlement* for a specific holiday. At this time, please do not choose this take. The UWSC will be reviewing the entitlements and using the take if appropriate. Use of this take will reduce an employee's Legal Holiday earnings for the period for someone who received the entitlement and was not eligible according to policy.
 - Further information will be provided for campus use in the future.

Questions?



End – Daylight Saving Time

- Please note that Daylight Saving Time ended on Sunday, November 4, 2018. The time change impacts employees who report time at 2:00AM on Sunday, November 4, 2018, or work shifts which span from Saturday, November 3, 2018, to Sunday, November 4, 2018, and cross the 2:00AM time change.
- HRS is configured to automatically adjust payable time for the autumn and spring DST changes. Time which includes the 2:00AM time change will have one hour (1.00) added in payable time in the autumn.
- For further information see KB-15561: TL - Daylight Saving Time

Illinois Tax Withholding 1/1/2019

- New in tax year 2019:
- Taxable wage reporting and tax withholding for the State of Illinois will be available
- Interested employees will need to submit an IL-W-4 to their campus for processing
- Elections for Illinois withholding can be entered in HRS after 12/14/2018 for the 12B and 12M payrolls (first payrolls paid in 2019).
- Further information can be found at the following URL:
<https://www2.illinois.gov/rev/forms/withholding/Documents/currentyear/il-w-4.pdf>

IL Tax Withholding 1/1/2019

Illinois requires the use of their form IL-W-4 for withholding/reporting.

Instructions for entry in HRS can be found in KB#16889.

A job aid has been posted to assist in IL-W-4 entry into HRS. (<https://uwservice.wisconsin.edu/docs/publications/pay-il-tax-info.pdf>)

Step 1: Figure your basic personal allowances (including allowances for dependents)

Check all that apply:

- No one else can claim me as a dependent.
 I can claim my spouse as a dependent.
- 1 Enter the total number of boxes you checked. 1 _____
2 Enter the number of dependents (other than you or your spouse) you will claim on your tax return. 2 _____
3 Add Lines 1 and 2. Enter the result. This is the total number of basic personal allowances to which you are **entitled**. You are not required to claim these allowances. The number of basic personal allowances that you choose to claim will determine how much money is withheld from your pay. See Line 4 for more information. 3 _____
4 Enter the total number of basic personal allowances you choose to claim on this line and Line 1 of Form IL-W-4 below. This number may not exceed the amount on Line 3 above, however you can claim as few as zero. Entering lower numbers here will result in more money being withheld (deducted) from your pay. 4 _____

Step 2: Figure your additional allowances

Check all that apply:

- I am 65 or older. I am legally blind.
 My spouse is 65 or older. My spouse is legally blind.
- 5 Enter the total number of boxes you checked. 5 _____
6 Enter any amount that you reported on Line 4 of the Deductions and Adjustments Worksheet for federal Form W-4 plus any additional Illinois subtractions or deductions. 6 _____
7 Divide Line 6 by 1,000. Round to the nearest whole number. Enter the result on Line 7. 7 _____
8 Add Lines 5 and 7. Enter the result. This is the total number of additional allowances to which you are **entitled**. You are not required to claim these allowances. The number of additional allowances that you choose to claim will determine how much money is withheld from your pay. 8 _____
9 Enter the total number of additional allowances you elect to claim on Line 2 of Form IL-W-4, below. This number may not exceed the amount on Line 8 above, however you can claim as few as zero. Entering lower numbers here will result in more money being withheld (deducted) from your pay. 9 _____

IMPORTANT: If you want to have additional amounts withheld from your pay, you may enter a dollar amount on Line 3 of Form IL-W-4 below. This amount will be deducted from your pay in addition to the amounts that are withheld as a result of the allowances you have claimed.

----- Cut here and give the certificate to your employer. Keep the top portion for your records. -----

Illinois Department of Revenue IL-W-4 Employee's Illinois Withholding Allowance Certificate

Social Security number

Name

Street address

City State ZIP

Check the box if you are exempt from federal and Illinois Income Tax withholding and sign and date the certificate.

1 Enter the total number of basic allowances that you are claiming (Step 1, Line 4, of the worksheet). 1 _____
2 Enter the total number of additional allowances that you are claiming (Step 2, Line 9, of the worksheet). 2 _____
3 Enter the additional amount you want withheld (deducted) from each pay. 3 _____

I certify that I am entitled to the number of withholding allowances claimed on this certificate.

Your signature _____ Date _____

IL-W-4 (R-08/17)

This form is authorized under the Illinois Income Tax Act. Disclosure of this information is required. Failure to provide information may result in this form not being processed and may result in a penalty.

Employer: Keep this certificate with your records. If you have referred the employee's federal certificate to the IRS and the IRS has notified you to disregard it, you may also be required to disregard this certificate. Even if you are not required to refer the employee's federal certificate to the IRS, you still may be required to refer this certificate to the Illinois Department of Revenue for information. See Illinois Income Tax Regulations RR III Admin. Code 100.7110.

Payroll – IL Tax Withholding

- Review Paycheck/Paycheck Taxes
 - Review Paycheck will display amount of withholding in tax section
 - Earnings Statement will display a separate line for Illinois wages and withholding

US Federal				Withholdng	1,254.88	112.71
State	IL			Unempl ER		
State	IL	Y		Withholdng	1,254.88	62.12

HRS – Tax Distribution

After you enter Update Tax Data W4 for IL, please update Tax Distribution.

Path: Payroll for NA/Employee Pay Data USA/Tax Information/Update Employee Tax Distribution

Add a new row for IL 100% tax distribution. (Every new employee is defaulted to WI 100%).

Please see KB#16889 for detailed instructions on entering W4.

The screenshot shows the 'Tax Distribution' web application interface. At the top, there is a header with 'Tax Distribution' and navigation options: 'Find | View All', 'First', '1 of 2', and 'Last'. Below the header, there is a form with the following fields and options:

- *Effective Date: 10/01/2018 (with a calendar icon)
- Country: USA
- Insert Pre-filled Tax Location

Below the form is a table titled 'States/Localities' with the following columns: *State, Locality, Locality Name, and Percent of Distribution. The table contains one row with the following data:

*State	Locality	Locality Name	Percent of Distribution
IL			100.000

The table also includes navigation options: 'Personalize | Find | View All', 'First', '1 of 1', and 'Last'. There are also search icons for the State and Locality columns.

Non-Standard Processing Schedule

11A Processing Schedule:

- 11/9 Create Paysheets (Friday)
- 11/12 Payline Deadline – 4:30 pm (Monday)
- 11/12 Payline Load (Monday)
- 11/13 FICA Deadline (Tuesday)
- 11/14 Final Calc/Confirm – Noon (Wednesday)

11M Processing Schedule:

- 11/15 Create Paysheets (Thursday)
- 11/16 Payline Deadline – 4:30 pm (Friday)
- 11/18 Payline Load (Sunday)
- 11/19 FICA Deadline (Monday)
- 11/20 Final Calc/Confirm – Noon (Tuesday)

Important Year-End Payroll Dates

Date	Event
11/30/2018	Last on-cycle pay date in 2018 for monthly paid staff (the 11M)
12/14/2018	Check Correction deadline to guarantee employees' original W-2s reflect the correct amounts
12/20/2018	Last on-cycle pay date in 2018 for bi-weekly paid staff (the 12A)
12/26/2018	NOON – Deadline for Missed Payroll submissions for inclusion on 2018 W-2s. They will be printed in the early afternoon.
12/26/2018	Last off-cycle check date for 2018 (bi-weekly and monthly paid staff)
12/28/2018	6:00 PM! Deadline for Foreign National Personal Data Changes in Glacier (related to 1042-S 2018)
1/4/2019	Final deadline for last minute Check Correction adjustments on an employee's W-2 (not guaranteed, based on volume)
1/4/2019	Deadline for Taxable Fringe Adjustments for calendar year 2018
1/4/2019	Deadline for Guaranteed Personal Data Changes (for ACA and W2 data)

Important Year-End Payroll Dates cont'd

Date	Event
1/11/2019	Deadline to choose electronic-only distribution of your W2
1/16/2019	Target date for starting the printing of W2s
1/23/2019	Targeted date for finish printing W2s
1/30/2019	Targeted date for employees to receive 2018 W-2s
1/31/2019	IRS postmark deadline for employees 2018 W-2s
2/27/2019	Targeted print date for 2018 Fellowship/Scholarship Letters
2/28/2019	Targeted print date for 2018 1042-S forms
3/3/2019	CYE posts to WISDM (approximately)
3/11/2019	Targeted date for employees to receive 2018 1042-S forms (3/15/2019 due)

<https://uwservice.wisconsin.edu/administration/cye>

Questions?



UW Portal Articles

- HR, Payroll, and Benefits news articles are posted to the University of Wisconsin Service Center website regularly
- The latest articles can be found at:
<https://uwservice.wisconsin.edu/news/>
- A current listing of published articles is below from oldest to newest:
 - FASL Appointees: Option to Bank Vacation in an Annual Leave Reserve Account (6/21/18)
 - WRS Contribution Rates to Decrease in 2019 (8/2/18, updated 10/29/18)

UW Portal Articles

- Continued listing of published articles:
 - Enroll Today with the UW Tax-Sheltered Annuity (TSA) 403(b) Program (9/4/18)
 - WRS News Online, September 2018 (9/7/18)
 - Submit Flexible Spending Account Claim Documentation Timely (9/10/18)
 - ALEX Available for 2019 Benefits Planning (9/18/18)
 - Earn Your \$150 Well Wisconsin Incentive (10/11/18)
 - UIA Life Insurance Annual \$24 Premium Deduction (10/16/18)
 - W-2/1095-C Electronic-Only Distribution Consent (10/31/18)

UW Portal Articles

Discussion:

- Is your campus taking advantage of these articles at this time? Do you share them through one or more methods with your employee population?
 - Employee Newsletters
 - HR Websites
 - HR Social Media Pages
 - Other Ideas?

Questions?



Upcoming Learning Path Courses - Finance

- **Setting Up Funding (remote)**
 - Nov 6 - AM
- **Changing Funding (remote)**
 - Nov 7 - AM
- **Direct Retro (remote)**
 - Nov 8 - AM

PY Calendar Review

← Today 10A 10B 10M →

November 2018

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