



## Affinity Group 1

### December 11, 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

- HRS Enhancements
  - BN: FSA Unsubstantiated Claims
  - PY: Faculty Sabbatical Updates
- Workflow for Addl Pay Queries – Security Update
- Workflow for Addl Pay – Add-On Codes
- Non-Standard Processing Schedule
- UW Portal Articles
- Calendar Review
- Important Year-End Payroll Dates
- Institutional Feedback

# HRS Enhancements - Reminder

- As of 12/15/2018
  - Enhanced ESS Absence Management (FAASLI)
  - Addition of Projected Balances for ESS
- Effective with 2019 Earnings Statements, leave balances will no longer appear on the statements:
  - 1/2/2019 First earnings statement for Monthly
  - 1/3/2019 First earnings statement for Biweekly

- Updated: 12/15/2018 email to impacted employees:
  - Email will include earning statement and ESS absence changes notice and links to resources available
  - Advance copy of email content will be provided to institutions

# Pop-Up Blocker Troubleshooting

- Users may need to allow pop ups when viewing earnings statements
- Supporting documentation on how to enable pop ups in various browsers will be available in the following areas:
  - Top of My UW Portal
  - Employee emails
  - Employee help page (resources)
- KB 15047 Web Browsers – Pop Up Blockers
  - <https://kb.wisc.edu/helpdesk/page.php?id=15047>

# Resources

- On 12/15, all resources will be available on the Time and Absence help page and the portal help pages

## Welcome to the UW Service Center

The UW System is made up of 13 four-year universities and 13 two-year branch campuses affiliated with seven of the four-year institutions.

### Upcoming Pay Dates

- **Biweekly:** Wednesday, November 21
- **Monthly:** Friday, November 30
- **Student Hourly:** Wednesday, November 21

2018 UW Employee Payroll Calendar  
2019 UW Employee Payroll Calendar

### Next Legal Holiday

- **Thanksgiving**  
Thursday, November 22

### For Employees and Managers

Log into [My UW](#) to view your earnings statements, tax statements and more. The links below offer help with the work-related modules available in My UW, along with additional helpful resources.

- Approvals Information
- Benefit Information
- Payroll Information
- Personal Information
- **Time and Absence**

### For HRS Administrators

### HR, Payroll and Benefit News

#### Review and Update Your Personal and Address Information

UW Service Center  
**NOVEMBER 19, 2018**

As the fall semester draws to a close, you are encouraged to review your Personal Information in the...

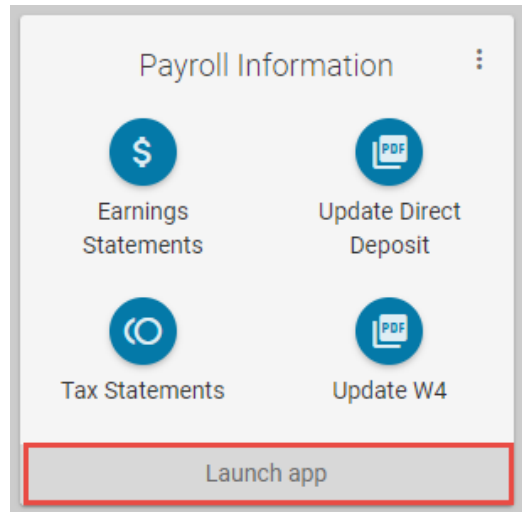
#### Employee Benefits Preferences Survey Coming Soon!

# HRS Enhancement – ESS Garnishment History

- New employee self-service page available 12/15/18
- Allows active employees with active or inactive garnishments/wage assignments to view:
  - Payment history by individual paycheck back to HRS go-live (April 2011)
  - Total amount deducted to date over the life of the order
  - Balance due (if applicable)
- Orders closed/paid in full prior to April 2011 will not show on this page
- Replaces the current paper balance statements mailed to some employees
- Accessed through the Payroll Information tile in the MyUW Portal

# HRS Enhancement – ESS Garnishment History

- Accessed through the Payroll Information tile in the MyUW Portal
  - Click the Garnishments/Wage Assignments button on the Earnings Statements page
  - Employees who have never had a garnishment/wage assignment in HRS will not see this button on the portal



**Earning Statements** Tax Statements

Your Net Pay Check amount is reflected on each individual Earnings Statement [show earnings dollar amounts](#)

Previous 1 2 3 4 5 6 7 8 10 11 Next

Paid	Earned	Amount
11/21/2018	10/28/2018 - 11/10/2018	
11/08/2018	10/14/2018 - 10/27/2018	
10/25/2018	09/30/2018 - 10/13/2018	
10/11/2018	09/16/2018 - 09/29/2018	
09/27/2018	09/02/2018 - 09/15/2018	
09/13/2018	08/19/2018 - 09/01/2018	
08/30/2018	08/05/2018 - 08/18/2018	
08/16/2018	07/22/2018 - 08/04/2018	
08/02/2018	07/08/2018 - 07/21/2018	
07/19/2018	06/24/2018 - 07/07/2018	

Previous 1 2 3 4 5 6 7 8 10 11 Next

[Update your Direct Deposit](#) [Garnishments/Wage Assignments](#)

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



# Questions?



# FSA Unsubstantiated Claims



***NEW Resource:*** All communications, for your reference, may be found at [www.wisconsin.edu/ohrwd/benefits/fsaunsubstantiated](http://www.wisconsin.edu/ohrwd/benefits/fsaunsubstantiated)

Notices to affected participants will be sent as follows:

- **From TASC:** 09/11\*, 11/16, 11/30, 12/10 and 12/20\*
- **From UW System:** week of 12/10 (reminder email), week of 1/14 (notice that payroll withholding will occur)

*\*Sent via US Mail and email; all others only sent via email.*

UW System HR will send the report received the week of 12/10/18 to the institutions as well as the UW SHR communication that will be sent directly to affected employees. The communication will remind participants to substantiate.

## *Action Necessary:*

Upon receipt of the report received the week of **12/10/18**, institutions should contact active employees directly with balances **greater than \$250** to ensure they have received the communications and are working toward substantiation.

This should occur prior to the start of the payroll withholding process (1/1/19).

# FSA Unsubstantiated Claims



## Current Unsubstantiated Claims (as of 11/30/18):

- **501** At or less than \$100
- **203** between \$100.01 and \$250
- **211** between \$250.01 and \$500
- **154** greater than \$500

*The above includes “inactive” employees; however, inactive employees should work directly with TASC to resolve their unsubstantiated claims.*

*No action required by the institution for inactive employees. Future reports will include a field indicating the employees status (active vs. inactive).*

# FSA Unsubstantiated Claims



## Payroll Withholding Process (1/1/19 – 3/31/19):

- **Balances at or less than \$100:** withheld from 1 paycheck
- **Balances greater than \$100:**
  - **Monthly:** equal deductions, withheld from **2 paychecks**
    - 2/1/19
    - 3/1/19
  - **Biweekly:** equal deductions, withheld from **5 paychecks**
    - 1/31/19
    - 2/14/19
    - 2/28/19
    - 3/14/19
    - 3/28/19

# FSA Unsubstantiated Claims



**What if an employee indicates payroll withholding will cause a financial hardship?**

The institution should contact UW System HR at [uwshr@uwsa.edu](mailto:uwshr@uwsa.edu) as soon as possible. There may be an opportunity to reduce the amount taken through payroll withholding if the email is sent to UW SHR by 4pm the day prior to the payroll confirm.

*Note: ETF and TASC require that a minimum of \$250 is processed through payroll withholding (1/1/19-3/31/19).*

Hardships should not be advertised to employees.

Claims that remain unresolved (for example: financial hardship) after the payroll withholding process (3/31/19) will be converted to business debt owed to ETF.

# FSA Unsubstantiated Claims



**Note:** ETF and TASC encourage participants to resolve unsubstantiated claims by 12/31/18; however, participants may resolve 1/1/19-3/31/19.

If a participant resolves 1/1/19-3/31/19 after the start of the payroll withholding process, the participant should work with TASC for a refund.

## How to resolve unsubstantiated claims after the start of the payroll withholding process:

*Participants resolving unsubstantiated claims after the start of the payroll withholding process must complete a paper **Plan Correction Form** (available at [www.partners.tasconline.com/ETFEmployee](http://www.partners.tasconline.com/ETFEmployee)).*

# FSA Unsubstantiated Claims



Refer employees with questions to TASC. Due to the complexities of the recovery process, TASC is the most appropriate party to answer questions regarding participant accounts.

## **TASC Customer Care**

844-786-3947 or 608-316-2408

[1customer care@tasconline.com](mailto:1customer care@tasconline.com)

***NEW Resource:*** A summary of the FSA unsubstantiated claims process, employee communications and tentative timeline may be found at: [www.wisconsin.edu/ohrwd/benefits/fsaunsubstantiated](http://www.wisconsin.edu/ohrwd/benefits/fsaunsubstantiated)



# Questions?



# Faculty Sabbatical Updates

- With the recent pay plan increases, Earning amounts in Addl Pay for full year Faculty Sabbatical need to be updated
  - Earnings Code 'USB'
  - Makes employee whole for WRS and Absence accruals
  - Hours amount remains the same
  - Reference Faculty Sabbatical KB 17072
- Step 1: Enter an End Date on current Addl Pay for USB
  - See KB 17094 for information on stopping an active additional pay record

# Faculty Sabbatical Updates

- Step 2: Create January Addl Pay
  - Use your institution's C-basis January payroll month for Begin and End dates
  - Earnings for January = Half month at old rate plus half month at new rate  
$$(\text{Old monthly rate} \times .5) + (\text{New monthly rate} \times .5) \times 35\%$$
- Step 3: Create February thru May Addl Pay
  - Begin date = First day of February C-basis payroll month
  - End date = Last day of May C-basis payroll month
  - Earnings = New monthly rate x 35%

# Workflow for Addl Pay Security Update

- Either of the following security roles provided access to the four Workflow for Additional Pay queries:
  - UW\_DYN\_PY\_ADDDL\_PAY\_APP (dynamically provisioned)
  - UW\_UNV\_PY\_PAYROLL\_VIEW
- See KB-86904: PY – Workflow for Additional Pay Queries for details
- Navigation for all queries: Reporting Tools > Query > Query Viewer

# Workflow for Addl Pay – Add-On Codes

- Records for add-on earnings that are entered through the Workflow Addl Pay Create page will load to the Create Additional Pay page after fully approved
  - This will occur regardless of the effective date of the entry or whether a payroll is open or not
- Add-ons earnings are paid with earnings codes starting with 'A'
- Best practice is to enter the add-on record with the current payroll pay period begin date (not a retroactive effective date) and get the record fully approved before paysheets are created

# Questions?



# Non-Standard Processing Schedule

## 12M Processing Schedule:

- 12/14 Create Paysheets (Friday)
- 12/17 Payline Deadline – 4:30 pm (Monday)
- 12/17 Payline Load (Monday)
- 12/18 FICA Deadline (Tuesday)
- 12/19 Final Calc/Confirm – Noon (Wednesday)

## 12B Processing Schedule:

- 12/20 Create Paysheets (Thursday)
- 12/21 Payline Deadline – 4:30 pm (Friday)
- 12/23 Payline Load (Sunday)
- 12/26 FICA Deadline (Wednesday)
- 12/27 Final Calc/Confirm – **10:00 am** (Thursday)

# PY Calendar Review

← Today →

December 2018

12A 12B 12M

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



# 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/>
- Recently published articles:
  - Social Security and Medicare Taxes for 2019 (12/5/18)
  - Monthly Pay Date for December Earnings is January 2, 2019 (12/5/18)

# 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>

# Institutional Feedback