



## Affinity Group December 18, 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: State Group Life Insurance Update  
ICI Annual Review Reminder
- TL: New Query – UW\_TL\_RPTD\_TIME\_AUDIT
- TAM: Non-UW Interviewer (POI 23)
- PY: Domestic Tax Renewal  
Non-Standard Processing Schedule  
Calendar Review
- PD: Upcoming Training  
  
UW Portal Articles  
Important Year-End Payroll Dates  
Institutional Feedback

# Security Roles for AM Enhanced View

Absence balances enhanced view AG call follow-up

The following roles provide the enhanced view for coordinators:

- UW\_UNV\_AM\_COORDINATOR\_CAMPUS
- UW\_UNV\_AM\_COORDINATOR\_DEPT

Navigation: [Manager Self Service](#) > [Time Management](#) > [View Time](#) > [Absence Balances](#)

# Questions?



# State Group Life Insurance



## Voluntary Cancellations:

Effective January 1, 2019, employees who voluntarily cancel their State Group Life Insurance will have their coverage cancelled at the end of the month he/she cancels coverage. Previously, employees would have to wait an extra month for the cancellation to take effect.

With this change, the coverage end date for all of the UW System life insurances is now the same (Individual & Family Life Insurance, UW Employees, Inc. and Accidental Death & Dismemberment).

## Example:

Coverage would end January 31, 2019 for an employee that voluntarily submits a [Life Insurance Application/Cancellation/Refusal \(ET-2304\) form](#) on any date in January 2019.

# State Group Life Insurance



## **Terminations:**

The coverage end date for terminations is already the end of the month in which he/she terminates.

## **Resources:**

ETF and UW System Human Resources are in the process of updating the materials and websites accordingly.

## **Questions:**

Send to [uwshr@uwsa.edu](mailto:uwshr@uwsa.edu)

# ICI Annual Review Reminder

- All leave swaps that will affect the ICI premium category must be:
  - Requested by the employee by the end of day **December 28, 2018**
  - Entered by administrators in HRS by **4:30pm on January 9, 2019**
- Once the ICI annual update process runs, any leave swaps will NOT change the 2019 ICI premium category.
- **Resources:**  
<https://uwservice.wisconsin.edu/administration/ici/#resources>

# Questions?





# New Time and Labor Query

## UW\_TL\_RPTD\_TIME\_AUDIT

- Returns the date, time, and operator ID of who made an entry on an employee's timesheet.
- KB 20530: TL – Time and Labor Queries has been updated with more information on this audit.
- *Note: If a user outside of your row level security made the entry you will not see that information in the results. If the query does not return results please contact your Affinity Group so they may run the query on your behalf.*

# Questions?



# TAM: Non-UW Interviewer (POI 23)

## Update – Change to where Non-UW Interviewers (POI 23) are added on the Job Opening Assignments page

- Non-UW Interviewers will be added to the [Interviewer section](#) of the Assignments Page instead of the Recruiter section

### KBs:

- 19321 TAM - Create Job Opening(s)
- 26512 TAM - Security Role Matrix

The screenshot displays the 'Assignments' tab of a job opening page. It features sections for 'Recruiters', 'Hiring Manager', 'Interviewers', and 'Interested Parties'. The 'Interviewers' section is highlighted with a red box. Below it, there is a search field for '\*Name' and 'Interviewer ID'. A red arrow points from a red box labeled 'Add Non-UW Interviewer (POI 23)' to the 'Add Interviewer' button. The 'Add Interviewer' button is also highlighted with a dashed red border. The 'Add Interviewer Team' button is also visible. At the bottom, there are buttons for 'Save and Submit', 'Save as Draft', and navigation links for 'Recruiting Home', 'Notification', and 'Start Over'.

# Questions?



# Domestic Tax Renewal

- The UW uses a combination of automated and manual processes to renew tax exemptions that expire annually.
  - Federal and/or State Withholding Exemption
  - W-200 (Employees pre-paying Wisconsin State Tax)
  - WT-4A (Employees electing to withhold flat amount of Wisconsin State Tax)
  - IRS Form 673 (U.S. Citizen performing UW work and residing outside USA)

# Domestic Tax Renewal

- Federal Withholding Exemption Renewal Timeline
  - Expires after January Monthly or January B Bi-Weekly
  - Employees notified week of 12/17/18 (tentative)
  - Employees to turn in forms by 1/25/19
  - Payroll entry deadline 2/6/19
  - Employees without new forms entered will be reset to Single / 0 on 2/8/19
- State Withholding Exemption Renewal
  - State Exemptions expire 4/30/19.
  - If an employee renews their federal and state before the state deadline, both will count.
  - A separate reminder will be sent in February for State renewal

# Domestic Tax Renewal

- Other exemptions have different deadlines
  - W-200 Expires after November Monthly or December A Bi-Weekly
  - W-200 Entry 12/17/18-12/19/18 (noon)
  - WT-4A Expires after March Monthly or April A Bi-Weekly
  - WT-4A Entry 4/19/19-4/24/19
  - IRS Form 673 Expiration Varies by Individual
- Resource: Annual Domestic Tax Renewals/Expirations  
<https://uwservice.wisconsin.edu/docs/publications/pay-domestic-tax-renew-expiration.pdf>

# Federal Renewal Process

- When the notification process runs, W-4 processing status changes to “Notification Sent”

The screenshot shows a web interface with three tabs: 'Federal Tax Data', 'State Tax Data', and 'Local Tax Data'. Below the tabs, the name 'YIMING SUI' and 'Person ID: 00388016' are visible. A checkbox labeled 'Exempt from FU' is checked. The 'W-4 Processing Status' dropdown menu is expanded, showing three options: 'None', 'Notification Sent' (which is highlighted in yellow), and 'New W-4 Received'.

- When new W-4 received, person entering must change status to “New W-4 Received”

The screenshot shows the same web interface as the previous one. The 'W-4 Processing Status' dropdown menu is expanded, and the 'New W-4 Received' option is now highlighted in yellow, indicating it has been selected.

- If the status is not changed, employee will be changed to single/0 when W-4's reset



# Sample State Tax Data

**Tax Data** ? Find | View All First 1 of 1 Last

Company UWS University of Wisconsin System Effective Date 07/28/2017

**State Information** Find | View All First 1 of 1 Last

\*State WI Wisconsin

Resident  UI Jurisdiction

Non-Residency Statement Filed  Exempt From SUT

**State Withholding Elements** ?

\*Special Withholding Tax Status Maintain taxable gross

\*Tax Marital Status X Claiming exemption from withholding

Withholding Allowances 0

Additional Amount \$411.00  WI WT-4A Filed Additional Amount Adjustment to be used as Flat Withholding Amount

Additional Percentage 0.000

Additional Allowances 0

▶ **Lock-In Letter Details** ?

**Tax Form Renewal Processing Status**

None  Tax Form Renewal Received  Notification Sent

**UW Special Tax Form Code**

Tax Form Renewal 03 WI WT-4A

Used for residents of reciprocity states (IL, IN, MI, KY)

Special status is "No taxable gross; no tax taken"

Used when exempt from withholding. Status of "Maintain taxable gross"

Special tax form goes here.

- Entry details in KB Document 16889: PY - Enter Employee's Tax Form W-4

# Claiming Exemption from State Withholding

- The Service Center will be requesting annual renewals in early January for all employees that are claiming exemption from Wisconsin Withholding Tax
  - State Regulations Publication 166 (below)
    - Deadline is April 30<sup>th</sup> to submit new exemption certificate
    - Communication will be sent with Federal renewal notices

Employers must retain copies of Forms WT-4 and WT-4A submitted by their employees. **Note: A claim for total exemption from withholding tax must be renewed annually.** Employers should review their records at the beginning of each year to ensure they have a current Form WT-4 on file for each employee claiming total exemption from withholding tax.

# 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 – **Noon** (Thursday)

# PY Calendar Review

December 2018						
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] Payroll and Benefit Retro and Payline Load [12A] 3rd Batch Prelim Calc	12 [12A] FICA Deadline [12A] 4th Batch Prelim Calc	13 [12A] Confirmation Deadline (Eve) [12A] Final Calc	14 [12M] 1st Batch Prelim Calc	15
16 [12M] 2nd Batch Prelim Calc	17 [12M] Payroll and Benefit Retro and Payline Load [12M] 4th Batch Prelim Calc	18 [12M] 5th Batch Prelim Calc [12M] FICA Deadline	19 [12M] Confirmation Deadline (Eve) [12M] Final Calc	20 [12A] Pay Date [12B] 1st Batch Prelim Calc	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] FICA Deadline [12B] 4th Batch Prelim Calc	27 [12B] Confirmation Deadline (Eve) [12B] Final Calc	28	29
30	31 [12M] Pay Period End New Year's Eve	1	2	3	4	5

# Upcoming Learning Path Courses

The training schedule for the new year has been released

- Benefits training held at the Service Center in Madison:
  - WRS Eligibility
    - 1/15/19 – 8:00 am
  - Benefits Eligibility & New Hire Hold
    - 1/15/19 – 11:00 am
  - Event Maintenance
    - 1/16/19 – 8:00 am
- HR training held at the Service Center in Madison:
  - Introduction to Hiring
    - 2/27/19 – 8:30 am
  - Updates: Person, Position, Job
    - 2/27/19 – 1:00 pm
  - Rehires, Transfers, Multiple Jobs
    - 2/28/19 – 9:00 am

# Upcoming Learning Path Courses – cont'd

- Payroll training :
  - Additional Pay
    - 1/17/19 – 8:30 am (held at the Service Center in Madison)
    - 3/14/19 – 8:30 am (offered via Blackboard Collaborate)
  - Setting up a Person in Payroll (held at the Service Center in Madison)
    - 2/13/19 – 9:00 am
  - Approver Maintenance (offered via Blackboard Collaborate)
    - 2/14/19 – 9:00 am
- Finance training offered via Blackboard Collaborate:
  - Setting up Funding
    - 1/29/19 – 8:30 am
    - 3/11/19 – 12:30 pm
  - Changing Funding
    - 1/30/19 – 8:30 am
    - 3/12/19 – 12:30 pm
  - Direct Retro
    - 1/31/19 – 9:00 am

# 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:
  - 2019 Insurance Benefits – Reminder of Changes (12/13/18)
  - 2019 Benefits ID Cards (12/13/18)
  - 2019 Insurance Premium Deductions (12/14/18)



# 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>