



Affinity Group January 8, 2019

- 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*

- HR: EJED Monitoring
- BN: ABE Appeals Reminder
TSA Program EZ Enrollment Form
- PY: Exception Payroll Processing
- TL: Elapsed Hourly Integrated Timesheet

Non-Standard Processing Schedule

Calendar Review

Upcoming Training

UW Portal Article

Important Year-End Payroll Dates

Institutional Feedback

EJED Monitoring

- EJED Monitoring
 - Run EJED Query as part of your daily routine
 - Send out email notes to supervisors asking for confirmation of employment termination
 - Best practice – Run and review EJED Query in advance
- EJED Query:
 - [KB 19326](#) HR - Expected Job End Date Query
 - Navigation path: *Reporting Tools > Query Viewer > UW_HR_EXPECTED_JOB_END_DATE*
 - Search Criteria - complete ALL four fields/options
 - Results in Excel can be sorted
- Take appropriate action to EJEDs on Job data
 - [KB 16409](#) HR - Maintaining Expected Job End Date
 - Reminder: Continuity may also need to be updated on the Position when making changes to the EJED.

EJED Monitoring cont'd

EJED Termination Report:

- [KB 16700](#) HR - HR Report List
 - Delivered nightly through Cypress
 - Lists the employees that were terminated during the nightly or monthly batch processes
 - Also shows if the employee was enrolled in benefits
- Best Practice – Used as a confirmation tool

January Monthly EJED will process on January 24th.

Questions?



BN: ABE Appeal Reminders

- Appeals must be completely filled out before submission to UWSC
 - Including employer section
- If appeals are not filled out completely and correctly, they will be returned to the institution
 - This causes delays to the appeals process


**Appeals must be submitted by
January 31, 2019, to ensure they will be reviewed.**

TSA Program EZ Enrollment Form



Effective January 11, 2019, there will be an updated EZ Enrollment Form available on the UW TSA 403(b) Program website.

This form combines the information from three separate provider-supplied forms.


UW Tax-Sheltered Annuity (TSA) 403(b) Program EZ Enrollment Form

To EZ enroll in the UW TSA 403(b) Program with Fidelity, T. Rowe Price, and/or TIAA, complete the information below and return this form to your [human resources office](#). If you would like to enroll with Ameriprise/Riversource or Lincoln Financial, visit the [UW TSA 403\(b\) Program website](#) for information.

Part 1

Provide your personal information.

Name: _____ Employee ID: _____

Address: _____ City: _____ State: _____ Zip Code: _____

Email Address: _____ Phone Number: _____

Part 2

Choose your provider(s), election type(s), and amount(s).
 Select a percentage of pay or a flat dollar amount for pre-tax and/or Roth after-tax for the provider(s) you want to enroll with¹. The funds you contribute² will be invested in the provider's Target Retirement Date Fund³ based on your date of birth. You can change or stop your contribution at any time by submitting a [Salary Reduction Agreement](#) to your human resources office. You can change your investment choices by logging into your account(s) or contacting your provider(s)⁴.

	Fidelity <small>Plan # 82828</small>	T. Rowe Price <small>Plan # 200629</small>	TIAA <small>Plan # 100088</small>
Pre-tax Election:			
Please begin my pre-tax contributions at:	<input type="checkbox"/> _____ %	<input type="checkbox"/> _____ %	<input type="checkbox"/> _____ %
	<input type="checkbox"/> \$ _____	<input type="checkbox"/> \$ _____	<input type="checkbox"/> \$ _____
Roth (After-tax) Election:			
Please begin my Roth contributions at:	<input type="checkbox"/> _____ %	<input type="checkbox"/> _____ %	<input type="checkbox"/> _____ %
	<input type="checkbox"/> \$ _____	<input type="checkbox"/> \$ _____	<input type="checkbox"/> \$ _____

¹ If you elect multiple providers, you will receive separate statements for each provider.
² A percentage of pay and flat dollar amount cannot be chosen for the same election type under one provider.
³ All contribution amounts are subject to IRS annual contribution limits.
⁴ For more information on Target Retirement Date Funds and to review other investment information, visit the provider's website via the [UW TSA 403\(b\) Program website](#).
⁵ Visit the [UW TSA 403\(b\) Program website](#) for provider contact information.

Note: Percentages elected must be in whole numbers between 1% and 100%.
 If you choose 100%, ALL of your salary will be deducted after federal and state deductions. You will have \$0.00 take-home pay.

Note: Flat dollar amounts selected must be a minimum of \$20 per monthly pay period or \$8 per biweekly pay period.

Part 3

Provide your signature and date.

I understand that it is my responsibility to select and monitor my investments to make sure they continue to reflect my financial situation, risk tolerance, and time horizon.¹ I understand I can change my investment election(s) at any time.

I understand that I can change my contribution amount(s) at any time by submitting a new Salary Reduction Agreement to my human resources office.

I understand that an account will be set up for me and there may be additional steps I need to take to finish setting up the account².

Signature: _____ Date: _____

¹ You should reexamine your strategy at least annually or whenever your financial situation changes. You may also wish to consult a financial advisor.
² After your first contribution is posted, you should designate a beneficiary by providing the information online or calling the provider for a form. You will need the social security number, date of birth, and address for each beneficiary.

Return this form to your human resources office. Deductions from your paycheck will be processed as soon as administratively possible. For questions, [contact your human resources office](#).

Please note: You may receive follow up communication from UW System about your enrollment.

FOR OFFICE USE ONLY

Employee ID: _____ Pay Period Effective: _____

Date Received: ____/____/____ Input by: _____ Date Entered: ____/____/____

Disclosure: Fidelity Investments, T. Rowe Price, and TIAA are independent entities and are not legally affiliated.

Rev 12/2018

TSA Program EZ Enrollment Form



Here are the forms that will be phased out and no longer be accepted:

Fidelity (one-sided flyer)

T. Rowe Price (brochure)

TIAA (folded pamphlet)

UNIVERSITY OF WISCONSIN SYSTEM
UW TSA 403(b) Program EZ Enrollment

To EZ enroll in the UW TSA 403(b) Program through Fidelity Investments (92222), fill in the information below and return this form to your human resources office.

Please enroll me in the UW TSA (Shelburne Annuity 403(b) Program at the rate selected below. I understand that until I make a change, the money I contribute will be invested in the Fidelity Freedom® Fund based on my date of birth. Fund Details are available online at advice.fidelity.com/info.

My Pre-tax Election:
 Please begin my pre-tax contributions at _____% (from 1% to 100% - whole percentages only) OR
 Please begin my pre-tax contributions at \$ _____ (minimum \$20/month, \$1 to weekly)

My Roth Election:
 Please begin my Roth or
 Please begin my pre-tax contributions at _____% (from 1% to 100% - whole percentages only) OR
 Please begin my pre-tax contributions at \$ _____ (minimum \$20/month, \$1 to weekly)

I understand that the UW TSA 403(b) Plan is a defined contribution plan. I agree to the terms and conditions of the plan and that I can go online to advice.fidelity.com/info to view the plan documents.

Fidelity Investments Workplace Savings Plan Contribution Form

1. PARTICIPANT INFORMATION

First Name: _____ Last Name: _____
 Social Security #: _____
 Date of Birth: _____
 Address: _____
 City: _____ State: _____ Zip: _____
 Daytime Phone: _____
 Email: _____

2. EMPLOYER AND PLAN

Name of Employer/Outfit/Division: _____
 Dept: _____
 Title: _____
 Supervisor: _____
 Date Received: _____

3. TYPES OF CONTRIBUTIONS

TYPE OF CONTRIBUTION AMOUNT EACH PAYCHECK

A. Salary Deferral Contribution	\$ _____
B. Roth Contribution	\$ _____
C. After-tax Contribution	\$ _____
D. 403(b) Pre-Tax Cash Deferral Contribution - Salary Deferral Contribution	\$ _____
E. 403(b) Pre-Tax Cash Deferral Contribution - Roth Contribution	\$ _____
F. 403(b) After-Tax Cash Deferral Contribution - Salary Deferral Contribution	\$ _____
G. 403(b) After-Tax Cash Deferral Contribution - Roth Contribution	\$ _____

T. Rowe Price

Enrolling in the UW TSA 403(b) Program doesn't have to be complicated.

RETIRE WITH CONFIDENCE

If you need a portfolio that automatically adjusts over time, consider investing in a T. Rowe Price Retirement Fund. Each Retirement Fund offers a diversified asset allocation designed for investors who will have 10% and more in or near the retirement year. The chart below can help you understand which Retirement Fund available in your plan is closest to the age you will turn 65.

Age when you'll retire	You might consider the following Retirement Fund:
55 or older	Retirement 2050 Fund
50-54	Retirement 2045 Fund
45-49	Retirement 2040 Fund
40-44	Retirement 2035 Fund
35-39	Retirement 2030 Fund
30-34	Retirement 2025 Fund
25-29	Retirement 2020 Fund
20-24	Retirement 2015 Fund
15-19	Retirement 2010 Fund
10-14	Retirement 2005 Fund

Depending on your risk tolerance, time horizon, and financial situation, you may consider a Retirement Fund with a different target date. For a diversified portfolio that maintains a stable asset allocation, consider the Retirement Balanced Fund.

UW TSA 403(b) Plan

I understand and I can change my investment election by visiting www.troweprice.com or by calling T. Rowe Price at 1-800-922-9945.

My Information:
 First Name: _____
 Last Name: _____
 Phone Number: _____
 Email Address: _____
 Signature: _____

UW TSA 403(b) Plan

Enroll. Save. Retire.
Your journey to retirement starts today.

Our focus is on you and your financial future.

University of Wisconsin System and TIAA are committed to helping you plan for a secure financial future. We've designed a program to help you get started with the UW TSA (Shelburne Annuity 403(b) Program) - through automatic payroll deductions. You can set the amount, and we'll manage it for you. You can also contribute at any time - on paydays, always or not. And your money has the opportunity to grow to help you reach your goals.

Take the first step towards retirement. Enroll today in the University of Wisconsin Tax-Deferred Annuity (TSA 403(b) Program).

By the UW TSA Program, we mean the plan you're enrolling for retirement. Whether it's yours, the one you're enrolling for, or the one to start saving for retirement later.

Why it's important to get started:

- There's no time to lose. The longer you wait, the more you'll need to save to reach your goals.
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- The longer you wait, the more you'll need to save to reach your goals.

The graph shows how much money a person would have if they saved \$100 a month for 30, 40 and 50 years.

UW TSA 403(b) Plan

I understand that the UW TSA 403(b) Plan is a defined contribution plan. I agree to the terms and conditions of the plan and that I can go online to advice.fidelity.com/info to view the plan documents.

TIAA

I understand that the UW TSA 403(b) Plan is a defined contribution plan. I agree to the terms and conditions of the plan and that I can go online to advice.fidelity.com/info to view the plan documents.

Fidelity (“Workplace Contribution Form”)

TSA Program EZ Enrollment Form



If you receive one of the old forms, please have the employee fill out the updated form. Keep in mind:

- EZ Enrollment forms should only be used when the employee is opening a new account with the TSA provider selected.
 - Institution benefits staff enter the deduction in HRS
 - UW SHR TSA staff will create and set up the account with the provider
- Salary Reduction Agreements should be used:
 - To start a deduction (check with the employee that their account has been created with the provider prior to the deduction being entered)
 - To stop a deduction
 - To change a current deduction (the employee can also use HRS to make a change to an already existing deduction)

TSA Program EZ Enrollment Form



- Keep original forms (either the EZ Enrollment Form or Salary Reduction Agreement) in the employee benefits file.
- Make sure the entire form is filled out, including the institution section at the bottom.
- For the EZ Enrollment Form, please scan (*preferred method*) to uwshr@uwsa.edu or fax to the UW SHR office prior to the final calc and confirm for the affected pay date.
 - Please do not send forms directly to UW SHR TSA staff

TSA Program EZ Enrollment Form



Please link directly to the address provided below.
Discard any blank copies of the old forms.

<https://www.wisconsin.edu/ohrwd/benefits/download/ret/tsa/ezenroll.pdf>

Contact uwshr@uwsa.edu with questions.

Questions?



Exception Payroll Processing

- This topic is from a campus request to review when it is appropriate to do the following actions:
 - Negative Payline Request
 - ACH Reversal
 - Check Correction
 - Payline Request
 - Missed Payroll Request

Exception Payroll Processing

Overpayment Options:

- Negative Payline Requests (preferred method)
- ACH Reversal (limited use)
- Check Correction

Exception Payroll Processing

Negative Payline Request

Used For:

- Overpayment of gross wages

Request When:

- Employee is active and will have future on-cycle paychecks
- Request can be applied to more than one payroll (“payment plan”)
- Use Payroll Payline Entry Template
 - <https://uwservice.wisconsin.edu/administration/payroll/>
- Submit errors using pay period dates

Exception Payroll Processing

ACH Reversal

Used For:

- Excessive overpayments that cannot be reasonably repaid via a payline

Request When:

- Active employee will not be able to pay back overpayment via negative paylines in one or two payrolls
- Overpayment was made on employee's last paycheck and error is caught at least 3 days before pay date to guarantee return of funds
- Bank Fraud/Lost Debit Card/Lost Checks
- Send in ACH reversal request to your AG

Exception Payroll Processing

Check Correction

Used For:

- Overpayment of gross wages
- Overpayment of net wages due to missed deductions
- Over-used leave upon termination

Request When:

- Employee has an inactive status and will not have future earnings (negative payline request is not an option)
- Does not meet the ACH Reversal criteria
- Active employee excessive overpayment after the 3 day ACH reversal window
- See KB #27632 for more information

Exception Payroll Processing

Underpayment Options:

- On-Cycle:
 - Regular processing through HRS
 - Enter and approve time for hourly employees
 - Payroll Retro
 - Payline Request
- Off-Cycle:
 - Missed Payroll Request (MPR)
- Best Practice:
 - Use MPR as last option – always ask employee if missed payment can be added to the next on-cycle paycheck

Exception Payroll Processing

Payline Request

- Active Employees:
 - Missed pay that doesn't meet the MPR guidelines or can wait until next on-cycle payroll (regular hours for hourly EEs should be entered on the timesheet)
 - Incorrectly calculated retro pay or retro pay that failed to load to employee's paycheck
- Inactive Employees:
 - Leave payouts after termination
 - Time entered into HRS after termination
- For payline requests, use the Payroll Payline Entry Template or Leave Payout Template
 - <https://uwservice.wisconsin.edu/administration/payroll/>

Exception Payroll Processing

Missed Payroll Request

Eligibility Criteria (see KB-22181):

- Regular Hours/Gross wages
 - Student Help – minimum of 5 hours
 - University Staff & Academic Hourly Staff – minimum of 8 hours
 - FA/AS/LI – minimum of 10% of regular gross pay
- Lump Sum payments – Must Follow WfAP Guidelines
 - Biweekly Student - \$100 minimum
 - Biweekly Non-Student - \$300 minimum
 - Monthly - \$1,000 minimum
- Items not accepted for MPR:
 - Overload, Overtime or Add-Ons
 - Additional Pay not part of regular gross
 - Term Leave Payouts
 - Retroactive Pay
 - Missed Pay Older than 1 Pay Period

Questions?



Elapsed Hourly Integrated Timesheet

As introduced in the Payroll and Benefits User Group Meeting, the new Elapsed (Exempt) Hourly Integrated Timesheet will be implemented in HRS. The Elapsed Hourly Integrated Timesheet will be available on February 10, 2019 with an effective date of February 3, 2019.

- Any time or absences entered prior to 2/10 will seamlessly convert to the new format.

Enhanced Features Include:

- Absence submission/edit/cancelation from the timesheet
- Condensed and efficient format
- Ability to delete multiple rows at once
- Ability to copy hours from previous period
- Enhanced exception visibility
- Reported and payable time status icons

Elapsed Hourly Integrated Timesheet

Collapsed View:

From 01/06/2019 to 01/12/2019 ?

Timesheet Additional Elements Show all columns by default

Select for Delete				Date	Status	Quantity	Time / Absence Code	Sched Hrs
<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>	<input type="button" value="🗨"/>	Sun	1/6	<input type="text"/>	<input type="text"/>	0.00
<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>	<input type="button" value="🗨"/>	Mon	1/7	8.00	<input type="text"/>	0.00
<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>	<input type="button" value="🗨"/>	Tue	1/8	8.00	<input type="text"/>	0.00
<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>	<input type="button" value="🗨"/>	Wed	1/9	8.00	<input type="text"/>	0.00
<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>	<input type="button" value="🗨"/>	Thu	1/10	8.00	<input type="text"/>	0.00
<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>	<input type="button" value="🗨"/>	Fri	1/11	8.00	Vacation (CLS)	0.00
<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>	<input type="button" value="🗨"/>	Sat	1/12	<input type="text"/>	<input type="text"/>	0.00

Expanded View:

From 01/06/2019 to 01/12/2019 ?

Show all columns by default

Select for Delete				Date	Status	Quantity	Time / Absence Code	Sched Hrs	Taskgroup	Task Profile ID	Date
<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>	<input type="button" value="🗨"/>	Sun	1/6	<input type="text"/>	<input type="text"/>	0.00	UW_DEFAULT	<input type="text"/>	1/6
<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>	<input type="button" value="🗨"/>	Mon	1/7	8.00	<input type="text"/>	0.00	UW_DEFAULT	<input type="text"/>	1/7
<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>	<input type="button" value="🗨"/>	Tue	1/8	8.00	<input type="text"/>	0.00	UW_DEFAULT	<input type="text"/>	1/8
<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>	<input type="button" value="🗨"/>	Wed	1/9	8.00	<input type="text"/>	0.00	UW_DEFAULT	<input type="text"/>	1/9
<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>	<input type="button" value="🗨"/>	Thu	1/10	8.00	<input type="text"/>	0.00	UW_DEFAULT	<input type="text"/>	1/10
<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>	<input type="button" value="🗨"/>	Fri	1/11	8.00	Vacation (CLS)	0.00	UW_DEFAULT	<input type="text"/>	1/11
<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>	<input type="button" value="🗨"/>	Sat	1/12	<input type="text"/>	<input type="text"/>	0.00	UW_DEFAULT	<input type="text"/>	1/12

Elapsed Hourly Integrated Timesheet

Dates to Remember:

- **Week of 1/28**
 - AG Call: Walkthrough of Resources
 - Resources available to Payroll Coordinators
 - Template communication and list of employees will be provided to each campus for distribution
- **Week of 2/4:**
 - Resources available to employees
- **Week of 2/10:**
 - Timesheet is live with effective date of 2/3

Questions?



Non-Standard Processing Schedule

1B Processing Schedule:

- 1/18 Create Paysheets (Friday)
- 1/18 Payline Deadline – 4:30 pm (Friday)
- 1/21 Payline/Retro Load (Monday - holiday)
- 1/22 FICA Deadline (Tuesday)
- 1/23 Final Calc/Confirm – Noon (Wednesday)

1M Processing Schedule:

- 1/24 Create Paysheets (Thursday)
- 1/25 Payline Deadline – 4:30 pm (Friday)
- 1/26 Payline/Retro Load (Saturday)
- 1/27 FICA Deadline (Sunday)
- 1/28 Final Calc/Confirm – noon (Monday)

PY Calendar Review

Today

1A 1B 1M

January 2019

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

Upcoming Learning Path Courses

The training schedule for the new year has been released

- 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

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/>
- Preview of upcoming articles:
 - W-2 (Wage and Tax Statements) Now Available – *targeted posting to coincide with availability of W-2 Forms.*
 - Income Continuation Insurance Deferred Enrollment Available Through March 1, 2019 for Eligible Employees – *targeted posting 1/22*
 - Save the Date! America Saves Week: DATES, 2019 – *targeted posting third week of January*
 - Well Wisconsin Program Incentive 2019 – *targeted posting last week January*

Important Year-End Payroll Dates

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>