



## Affinity Group 1

### January 15, 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*

# Agenda

- HR: New POI Type 32  
Colleges and Extension Mass Load for Restructuring  
TAM Screening Questions
- BN: ICI Annual Update  
Delta Dental plan switches  
Unsubstantiated Claims
- PY: W-2 Information

Non-Standard Processing Schedule  
Calendar Review  
Important Year-End Payroll Dates  
Institutional Feedback

# New POI Type

The following new Person of Interest (POI) Type has been requested and will be available in HRS on February 10, 2019.

- 00032 EXT Integrated Specialist

This POI Type is intended for employees of non-Madison four-year institutions that are partially funded by Cooperative Extension as defined in an inter-institutional agreement.

This POI Type will be granted access to Madison specific systems (Professional Development tool, TREMs, etc.); no additional HRS access will be granted.

# Colleges and Extension Mass Load

- As a result of the UW Colleges and UW Extension Restructure, the Restructuring Teams at Receiving Institutions have worked with the UW Colleges and UW-Extension Office of Human Resources and the UW Service Center to compile a report containing all active jobs that are scheduled to transition to their respective institutions
- Effective date based on the start of the fiscal year (i.e. 7/1/19, 6/23/19, etc.)

# Colleges and Extension Mass Load

- Mass load will be processed on 1/15/19 with a future effective dated row.
- Action of POS/DTA and Action Reason 029 Colleges and Extension Restructure will be used. Updates will include (if provided back to the Service Center by receiving institutions):
  - Position
  - Job
  - POI
- Updates will include:
  - Business Unit
  - Department ID
  - Location Code
  - Reports To (if applicable)
- Output files will be provided to receiving institutions

# Colleges and Extension Mass Load


- The Service Center will run secondary listings for any outstanding employees whose position, job, or POI data did not transition as part of this load and will work with the UW Colleges and Extension HR Office and the institutions.
- The Service Center will work with the System Budget Office to open the CAT for Budgeting purposes after review of the outstanding position, job, and POI data that was not transitioned.

# TAM Updates to Screening Questions

Updates regarding UPS Operational Policy TC1:  
Recruitment changes and Applicant Data Mining:

- Questions are now automatically included with every online application in Candidate Gateway and Self Service Careers.
  - Recruiters no longer need to add them to the screening tab in a Job Opening
  - Applicants will be required to answer before submitting an application
  - Questions will only be applied to new Job Openings posted to Candidate Gateway/Self Service Careers **on or after Sunday 1/13/2019**
  - Additional note added to 7 year UW or State Employment & Most Recent Employer questions:
    - **\*\*Note:** the current employer will only be contacted if the applicant is deemed a final candidate.

# Questions in Online Application

< ExitApply for Job

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**PROFESSOR**

1 Start Complete

2 Resume/Curriculum Vitae Complete

3 Attachments Complete

4 Preferences (Optional) Complete

**5 Online Questionnaire In Progress**

6 References Not Started

7 Request for Confidentiality Not Started

8 How did you find out about the position? Not Started

9 Review and Submit Not Started

Frequently Asked Questions

**Step 5 of 9: Online Questionnaire**

**Education History**

Highest Education Level

**Degrees**

You have not added any degrees to your application.

**Questionnaire (Required)**

1. Would you like to be considered for other positions for which you are qualified?

Yes

No

**Open Ended Questions (Required)**

1. Are you currently employed by or have been employed by a UW System institution or a State of Wisconsin agency during the last seven years? Please indicate Yes or No. \*\*Note: the current employer will only be contacted if the applicant is deemed a final candidate. If Yes, please provide below the institution or agency and your supervisor name/contact information for each.

Total Words 0

2. Please list your most recent employer, supervisor's name, and supervisor's contact information. \*\*Note: the current employer will only be contacted if the applicant is deemed a final candidate.

Total Words 0



# Questions in Online Application

Message received if Applicant does not answer one or all the questions

**UW UNIVERSITY OF WISCONSIN SYSTEM**

< Exit

**PROFESSOR**

- 1 Start Complete
- 2 Resume/Curriculum Vitae Complete
- 3 Attachments Complete
- 4 Preferences (Optional) Complete
- 5 Online Questionnaire In Progress**
- 6 References Not Started
- 7 Request for Confidentiality Not Started
- 8 How did you find out about the position? Not Started
- 9 Review and Submit Not Started

Frequently Asked Questions

**Step 5 of 9: Online Questionnaire**

**Education History**

Highest Education Level G-Bachelor's Level Degree

**Degrees**

You have not added any degrees to your application.

Add Degrees

**Questionnaire (Required)**

! Would you like to be considered for other positions for...  
 Yes  
 No

**Open Ended Questions (Required)**

! Are you currently employed by or have been employed by a UW System institution... years? Please indicate Yes or No. \*\*Note: the current employer will only be contacted if the applicant is deemed a final candidate. please provide below the institution or agency and your supervisor name/contact information

Word Count Total Words 0

! Please list your most recent employer, supervisor's name, and supervisor's contact information if the applicant is deemed a final candidate.

You have not answered Questionnaire 1.  
You have not answered Open Ended Questions 1, 2.  
Please provide an answer to these questions before continuing.

OK

# Questions?



# ICI Deferred Enrollment

- ICI Deferred Enrollment is an opportunity for an employee to enroll into the program outside of their New Hire election.
- University Staff can enroll in the ICI benefit plan when they reach each of the below balances for the first time:
  - Sick leave balances are as of December B (pay period end 12/22/2018) :

ICI Category	Sick Leave Hours
University Staff - Category 3	80 Year to date balance*
University Staff - Category 4	520 – 727 Life to date balance
University Staff - Category 5	728 – 1040 Life to date balance

- \*Prorated based on FTE or sick leave earned

# ICI Deferred Enrollment

- All ICI eligible employees can enroll any year in which their sick leave balance is more than 1040 hours by December B or December Monthly payroll.
- Deferred enrollment opportunity for:

ICI Category	Sick Leave Hours
University Staff - Category 6	> 1040 Life to date balance

ICI Category	Sick Leave Hours
FA/AS/LI – 180 Days	> 1040 Life to date balance

# ICI Timeline

- **January 18, 2019** – UWSC will send email notices to employees eligible for Deferred or Supplemental enrollment into ICI
  - ICI look-up tool will be available
- **February 1 – 2, 2019** – UWSC will be updating Job Data and ICI Benefit plan enrollment
- **March 1, 2019** – Employee deadline to submit paper application for Deferred or Supplemental enrollment into ICI
- **March 29 – 30, 2019** – UWSC will be updating Job Data to provide election entry for Deferred or Supplemental enrollment into ICI
- **April 18, 2019** – Campus deadline for University Staff election entry for ICI Deferred Enrollment
- **April 24, 2019** – Campus deadline for FA/AS/LI election entry for ICI Deferred Enrollment

# ICI References

- Employee References:
  - <https://www.wisconsin.edu/ohrwd/benefits/dis/ici/>
- Administrator References:
  - [ICI Administrator Landing page](#)
    - A list of KB resources
    - Links to UWSA and UWMSN Policy are available

# Questions?



# Supplemental Dental

- The new supplemental dental plans for 2019 use different dental networks.
  - **Select Plan:** uses Delta Dental's **PPO** network
  - **Select Plus Plan:** uses Delta Dental's **PPO** and **Premier** networks
- ETF is offering employees the opportunity to switch from the Delta Dental **Select Plan** to the **Select Plus Plan** if their dental provider is only in the Premier network (not the PPO).
- Employees may make this change through **January 31, 2019** by completing a paper application.
- Coverage effective date will be **February 1, 2019.**
- Employee's can review their Benefits Summary in the portal to see which Supplemental Dental plan they elected.



# Supplemental Dental

- Employees can find out which network a dentist is in by:
  - Going to [www.deltadentalwi.com/state-of-wi/](http://www.deltadentalwi.com/state-of-wi/) then “Provider Search” and “Find a Network Dentist”:



- Calling Delta Dental at 800-236-3712
- Calling the dentist’s office directly

# Supplemental Dental

- All other supplemental dental insurance plan changes should follow the appeals process.
- Please send questions to [uwshr@uwsa.edu](mailto:uwshr@uwsa.edu).

# Health Care FSA: Unsubstantiated Claims

## Communications:

- The final communication to affected participants will be sent the week of **1/14/19** by UW System HR.
- The communication will notify participants of payroll withholding that will begin January 31<sup>st</sup> (bi-weekly paid employees) or February 1<sup>st</sup> (monthly paid employees).
- UW System will send the TASC report and communication to institutions prior to it being sent to affected participants.

# Health Care FSA: Unsubstantiated Claims

## Payroll Withholding Process:

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

# Health Care FSA: Unsubstantiated Claims

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

- Institutions should contact UW System HR at [uwshr@uwsa.edu](mailto:uwshr@uwsa.edu) ASAP. 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 calc. Institutions should not stop or modify an employees general deduction in HRS.

**Note:** *ETF and TASC require that a minimum of \$250 is processed through payroll withholding.*

- Options for financial hardships should not be advertised. Claims that remain unresolved after the payroll withholding process will be converted to business debt owed to ETF.

# Health Care FSA: Unsubstantiated Claims

- If a participant resolves claims during the payroll withholding process, TASC will notify the UW Service Center to stop future deductions and TASC will automatically issue a refund to the participant.

## How to resolve unsubstantiated claims during the payroll withholding process:

- *Participants resolving unsubstantiated claims during the payroll withholding process must complete a paper **Plan Correction Form** (available at [www.partners.tasconline.com/ETFEmployee](http://www.partners.tasconline.com/ETFEmployee)) and submit to [stateofwiappeals@tasconline.com](mailto:stateofwiappeals@tasconline.com) by March 31, 2019.*

# Health Care FSA: Unsubstantiated Claims

What is the benefit of resolving unsubstantiated claims during the payroll withholding process?

- The carryover provision in the plan is only available to those that have substantiated all debit card transactions (many are auto-substantiated).
- Participants who do not substantiate may not be able to carry over up to \$500 for other FSA qualifying expenses.

# Health Care FSA: Unsubstantiated Claims

Refer employees with questions to:

## **TASC Customer Care**

844-786-3947 or 608-316-2408

[1customercare@tasconline.com](mailto:1customercare@tasconline.com)

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

***Reminder:** This withholding process only applies to “active” employees. Inactive employees will be contacted directly by ETF to resolve their unsubstantiated claims.*



# Questions?



# Reminder: W-2 Electronic-Only Consent

## The W-2 Electronic-only Distribution Option

- Employees who did not complete the consent form by the January 11<sup>th</sup> deadline will continue to have their forms mailed to them via US Mail.
- An employee who consents to electronic-only distribution may subsequently withdraw consent.
- Employees who have terminated employment will receive paper W-2 forms mailed to them via US Mail.

# Security for Accessing the W-2

- All active employees have access to their W2 electronically
- Accessing the W2
  - Employees will enter their last 4 of SSN and date of birth plus check a checkbox stating that this is their correct information.
- For security of the employee's personal information, the W-2 form can only be accessed while connected to a University of Wisconsin network either directly or through VPN.
- When a user fails to authenticate properly, a pop-up window appears with the message, "The values entered in the identity fields do not match those found in the system. Enter the values exactly as shown in HRS Personal Details."

## Lockout (after a 3rd failed attempt)

- The user has three attempts to login before a 1-hour lockout.
- Upon lockout, the following message appears: “You have been temporarily locked out due to multiple failed validation attempts.”
  - The page will then be disabled.
  - Re-entering the page during the next hour returns them to a disabled page and the following message: “You have been temporarily locked out due to multiple failed identity validation attempts. Please verify your identity values and try again later.”
- After the 1-hour lockout is complete, the session reopens, and the user has an additional 3 attempts to login.

# Security for W-2 - Lockout

## Lockout (after a 6<sup>th</sup> failed attempt)

- The account will be flagged and hard locked by the HRS Security Team
  - The lockout occurs through an overnight process and is not immediate.
- The account and access to HRS will remain locked until:
  - Institution's helpdesk confirms to the HRS Security Team that the credentials are safe to unlock.
  - The CSOC (Cybersecurity Surveillance and Operations Center) will reach out to the campus Help Desks to ensure they are working with the employees to reset the credential.

# Resources

Additional W-2 information is available on the Payroll Help page:  
<https://uwservice.wisconsin.edu/help/payroll#electronic-consent-help>

SERVICE CENTER HOME MY UW HELP FORMS/PUBLICATIONS HRIS ADMINISTRATION SEARCH UWSC

UW Service Center / Payroll Help

## Payroll Help

Payroll Calendars Earnings Statement Help **Tax Statements** W-2 / 1095-C Electronic Consent Help Garnishments

### Tax Information

Common questions and Knowledge Base links to help interpret and understand the content of your tax statements.

**How do I access my tax statements online?**  
The Form W-2 (Wage and Tax Statement), 1042-S, and Fellowship Letter are available online in My UW System. You may view and print your statements. To access your statements:

# 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

# 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>

# Institutional Feedback