



AG Call
October 22, 2019

Agenda:

- HR: Electronic P-File in HRS
- BN: Rescind/Appeal ABE Elections
TSA Frozen Provider Letters
- OBIEE: Earnings Statement by Department
- PD: Upcoming Classes
eLearning Opportunities

Portal Articles

Institutional Feedback

HR: Electronic P-File in HRS

- The recommendation to have an e-personnel file system was driven by the Board of Regents
- The policy to support this initiative is [UW System Administrative Policy 1261 Personnel Files](#)
- Based on this policy, UW institutions and outside state agencies need to be able to share employee personnel files electronically

HR: P-File Workshop – Save the Date

- What: Navigation, functionality and supporting resources
- When: Thursday, October 31, 1:30-3:00 pm
- Where: Join us online
 - Video URL:
<https://us.bbcollab.com/guest/447d5d9f969e49baa0abb6e4fff16170>
 - Call-in: 1-866-244-1129; Passcode - 8646190#

Questions?



2020 ABE Appeals – RESCIND

To **rescind** ABE elections, employees must notify their human resources office (letter or email) **by close of business 12/31/19**.

- **If original ABE elections were made via paper application:**
 1. Institutions copy application and write “RESCIND” at the top.
 2. Employee must sign or initial application next to the word “RESCIND”
 3. Fax “RESCIND” application to UWSS Benefits (fax: 608-890-2327)
 4. File “RESCIND” application & employees written request in benefits file
- **If original ABE elections were made via Self Service:**
 1. Institutions have employee complete paper application for election made during ABE, sign, date and write “RESCIND” and initial or sign at the top
 2. Follow steps 2, 3 and 4 from above

Result: Coverage in effect December 31st will be reinstated.

2020 ABE Appeals Processes

The ABE appeals process differs based on which benefit(s) are appealed. Employees must notify their human resources office (letter or email) **by close of business 1/31/20**.

- FSA and HSA Appeals
- State Group Health, Opt-Out Incentive, Dental (Preventive, Select, Select Plus), Vision and Accident Insurance Appeals

Reasons an employee may file an appeal:

- To enroll in or change plans or plan designs
- To change from single to family or family to single coverage
- To remove a dependent

Notes:

- No action during ABE is **not** a basis for an appeal
- Submitting an appeal does not guarantee approval
- Effective dates for approved appeals will vary upon receipt of appeal

2020 ABE Appeals – FSA and HSA

FSA or HSA, appeals must be submitted to UWSS by close of business **1/31/20**. Late enrollments will be denied unless the below circumstances are encountered:

- **Administrative Error:**

- System issue prevented an enrollment from processing

- **Employee Enrollment Error:**

- Example: Employee enrolled in Dependent Day Care; however, does not have any eligible dependents. This employee meant to enroll in Health Care FSA
- Employee enrolled in HDHP and not an HSA

Documentation: ConnectYourCare (CYC) requires supportive documentation for all appeals. Submit all forms and documentation together.

2020 ABE Appeals – FSA and HSA (cont'd)

- 1) Employee: Complete CYC Late Enrollment Request Form and FSA or HSA Enrollment Form and employee statement. Submit to their human resources office.
- 2) **Institution:** Write Employer Statement with information to either support/not support employee's request
- 3) **Institution:** Fax forms and supporting documents to UWSS Benefits (Attn: Erinn Bittinger); fax 608-890-2327
- 4) UWSS Benefits: Create WiscIT
- 5) UWSS Benefits: Submit forms and supporting documents to CYC (if HSA, submit to CYC **and** ETF)
- 6) CYC: Notify UWSS Benefits of approval or denial
- 7) UWSS Benefits: Notify institution of decision via WiscIT & update HRS

Health, Opt-Out, Dental (Preventive, Select, Select Plus), Vision and Accident

- 1) Employee: Submits written request (letter or email) with enrollment form and documentation to human resources.
- 2) **Institution:** Write Employer Statement (letter or email) with information to either support/not support employee's request
- 3) **Institution:** Fax forms and supporting documents to UWSS Benefits (Attn: Erinn Bittinger); fax 608-890-2327
- 4) UWSS Benefits: Create WiscIT
- 5) UWSS Benefits: Submit forms & supporting documents to ETF (State Group Health) or UW System HR (all other plans)
- 6) UW System HR or ETF: Notify UWSS Benefits of approval or denial (via email)
- 7) UWSS Benefits: Submit to ETF for eligibility verification (if Opt-Out Incentive approved by UW System HR)
- 8) UWSS Benefits: Notify institution of decision via WiscIT; update HRS

2020 ABE Appeals – How to Submit

Fax appeals to UWSS Benefits at: 608-890-2327

- A WiscIT will be assigned by UWSS Benefits (Erinn Bittinger)

Deadline Reminders:

All requests must be submitted to UWSS by close of business:

- **December 31, 2019** – Rescind requests
- **January 31, 2020** – All other appeal requests

Resources:

[ABE landing page](#): Fax cover sheets, these slides and the FSA/HSA Late Enrollment Request Form (Resources tab).

[ABE Website](#): Applications/Enrollment Forms

Questions?



TSA Program: Frozen Providers Letters

- Letters are being sent to employees (both active and terminated) who have funds with **frozen** TSA providers to inform them of different options they can take with their funds. This will benefit:
 - Participants by making the management of their TSA easier and more cost effective and
 - The UW by helping with plan administration.
- Options available:
 - Employees who have an account with a current provider can complete an in-plan transfer of funds to a current provider.
 - Employees who do not have an account with a current provider can open an account with a current provider and then complete an in-plan transfer of funds to the current provider.
 - Employees who have terminated, reached age 59 ½, or become disabled may also withdraw or rollover their funds.

TSA Program: Frozen Providers Letters

- The options listed on the previous slide are not requirements. Employees can leave the funds with the frozen providers if they choose.
- Frozen TSA providers include: Dreyfus Retirement Services, AUL (OneAmerica), Wells Fargo (Strong Investments), DWS (Scudder), Security Benefits Life.
- Current TSA providers are: Ameriprise, Fidelity, Lincoln, TIAA and T. Rowe Price.
- The first letters will be sent out in the coming weeks to employees with an account at Wells Fargo (approximately 200 participants).
- The same process will be done with each frozen provider.
- Employees are directed to contact UW System HR if they have questions on the information in the letter.
- Questions you may receive from employees on the letters should be directed to UW System HR by emailing uwshr@uwsa.edu.

Questions?



OBIEE: New Report

- Earnings Statements by Department/Sub-Department
 - Payroll Dashboard
 - Navigate to Payroll & Deductions
 - New tab next to “Earnings Statement by Employee”

Questions?



PD: Upcoming Classes

- Finance Courses offered Remotely
 - Setting Up Funding – Tuesday Nov. 5, 12:30-4:00
 - Changing Funding – Wednesday Nov. 6, 12:30-3:30
 - Direct Retro – Thursday Nov. 7, 12:30-3:30

PD: eLearnings - Available Anytime

- Benefits
 - Annual Benefit Base Rate
 - Benefits Billing
 - Deduction Prepays
 - Wisconsin Retirement System
- Finance
 - Intro to Funding
- Human Resource
 - Searching for a Person
 - Student Hire Non-Template
 - Student Hire Multiple Jobs and Rehire
 - Student Template Hire
 - Summer Service/Summer Session

PD: eLearnings - Available Anytime

- Payroll
 - Intro to Payroll
 - Additional Pay Upload Process
 - FICA
 - On Cycle Payroll Process
 - Off Cycle Payroll – Part 1 and 2
- Intro to HRS
- Payroll Calendar

- Courses are available on your Learning Path based upon security roles.
- If you don't see a course and are interested, have your supervisor send an email with their approval to uwsctraining@uwsa.edu

Questions?



Portal Articles

Upcoming Articles:

- TASC Transition
- Mandatory Security Training
- Review/Update Your Personal Address Information
- 2020 Tax-Sheltered Annuity and Wisconsin Deferred Comp Limits
- Electronic-Only Distribution of W-2 and 1095-C Forms

Recently Posted Articles:

- OCTOBER 8: [UIA Life Insurance Annual Premium Deduction](#)
- OCTOBER 1: [Individual & Family Life Enrollees can Increase Coverage, 9/30–10/25/19](#)
- SEPTEMBER 24: [Annual Benefits Enrollment: 9/30–10/25/19](#)
- SEPTEMBER 23: [Reminders for Health Care Flexible Spending Account Participants](#)
- SEPTEMBER 19: [ALEX Can Help with Benefits Decisions during ABE, 9/30–10/25/19](#)