



# INSTITUTION ADMINISTRATOR CALL

November 9<sup>th</sup>, 2023



# AGENDA

- Portal Articles
- Upcoming Employee Emails
- Upcoming Training
- HRS Outage
- 2024 Social Security Wage Base Increase
- CYE Dates 2023
- 2023 Healthcare FSA Unsubstantiated Claims
- Payroll Deduction Schedule Changes – Terminating Employees
- SH Reports To Process Updates



# PORTAL ARTICLES

## Upcoming Articles

- Review/Update Your Address and Personal Information
- Reminder: Deadlines for Using Flexible Spending Accounts
- What is an Explanation of Benefits?
- Benefit Insurance Premium Deduction Schedule Change
- Great American Smokeout
- 2024 Social Security and Medicare Tax
- Supplemental Retirement Plan Contribution Limits for 2024



# UPCOMING EMPLOYEE EMAILS

| Employee Email   | Scheduled Distribution |
|--|------------------------|
| • 403(b) and WDC contribution deduction schedule change                          | 11/10                  |
| • Review/Update Address and Personal Information for all active employees        | 11/11                  |
| • HSA deduction schedule change for 9-month employees <i>enrolled</i> in HDHP    | 11/16                  |
| • Deduction schedule change 9 and 12-month employees <i>not enrolled</i> in HDHP | 11/16                  |
| • UW Employees, Inc. plan termination notification to current participants       | Mid-Nov.               |
| • Address review/update for inactive employees                                   | 11-26                  |
| • Electronic consent opportunity for tax form distribution                       | 12-3                   |
| • Electronic non-consent option to employees who currently have consent          | 12-5                   |

Note: Scheduled distribution dates are subject to change.



# UPCOMING TRAINING

- FN
  - Setting Up Funding (Remote online)
    - Thursday, November 16, 9:00am-12:00pm
  - Changing Funding (Remote online)
    - Friday, November 17, 9:00am-12:00pm
- TAM
  - Recruiting in TAM (Remote online)
    - Friday, December 1, 8:30am-4:00pm

[My Learning Path](#)



# HRS OUTAGE

HRS outage from 6:00 AM – 12:00 PM on Saturday, November 11

- A banner message will be posted on MyUW portal
- A message will be posted to the announcement tile in HRS
- A message on Candidate Gateway

Impacted areas include

- HRS production access
- MyUW (time, absence, personal information, benefits, including access to tax documents, appeal forms, RWA forms, etc.)
- TAM application service
- EPM Data Warehouse

# 2024 SOCIAL SECURITY WAGE BASE INCREASE

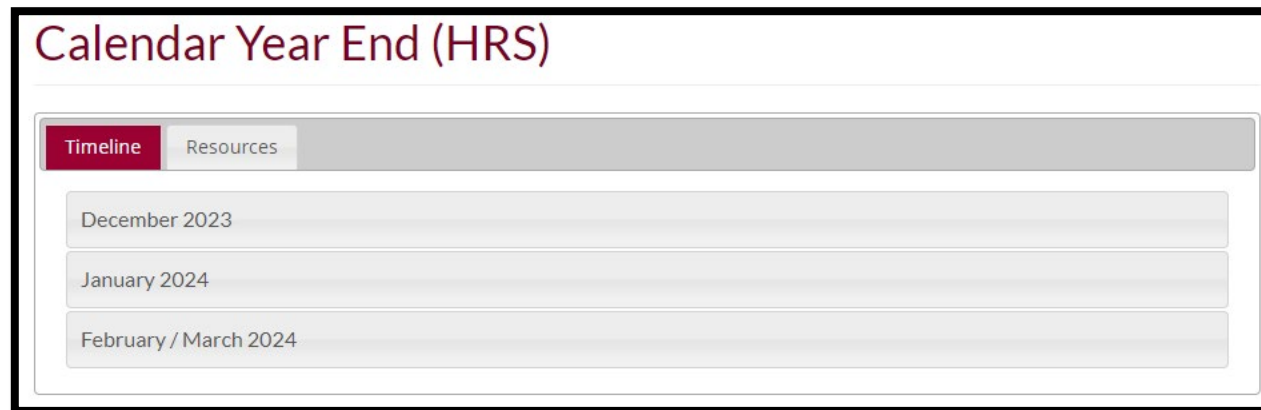


- The Social Security Administration announced the 2024 social security wage base will be \$168,600
  - This is an increase of \$8,400, up from \$160,200 in 2023
  - Maximum withholding for 2024 is \$10,453.20, which is 6.2% of the first \$168,600 in taxable wages.
- Reminder: There is no wage limit for Medicare -withholding; all taxable wages are subject to the 1.45% tax
  - Wages in excess of \$200,000 will be subject to an additional 0.9% tax



# CYE DATES 2023

- Important Calendar Year-End Dates for 2023-2024 have been released
  - [Calendar Year End \(CYE\) web page](#)
- Dates have been categorized by month for your convenience

A screenshot of a web page titled "Calendar Year End (HRS)". The page has a white background with a dark red header. Below the header, there are two tabs: "Timeline" (which is active and highlighted in dark red) and "Resources" (which is greyed out). Under the "Timeline" tab, there are three horizontal bars representing different time periods: "December 2023", "January 2024", and "February / March 2024".

Calendar Year End (HRS)

Timeline Resources

December 2023

January 2024

February / March 2024





QUESTIONS?



# 2023 HEALTHCARE FSA UNSUBSTANTIATED CLAIMS



## Healthcare Flexible Spending Account (FSA) reminders

- An FSA is a **tax-free** account subject to IRS regulations
- IRS regulations require **all** healthcare claims to be substantiated
- Most payment card transactions are **auto-substantiated**. When they are not, an employee must submit documentation to Optum to substantiate.

## Important Dates

- 12/31/2023: To **avoid** the payroll withholding process, participants should substantiate claims by this date
- 1/1/2024 – 3/31/2024: Participants **may** substantiate claims during this timeframe, but the claims **will also** go through the payroll withholding process

# 2023 HEALTHCARE FSA UNSUBSTANTIATED CLAIMS



## Optum Communications

- When a claim is not auto-substantiated, Optum sends communications following the payment card transaction on the 10<sup>th</sup> day, 40<sup>th</sup> day, and 70<sup>th</sup> day
- The Optum communications tell participants to resolve their claim electronically by using the mobile app, online portal, or by completing a paper claim form
- The Optum communications remind them to resolve their claims by:
  - Substantiating the claims,
  - Substituting with a different eligible expense, or
  - Repaying the claim
- If claims are not resolved within 85 days, the claim will be denied, and the payment card will be deactivated

# 2023 HEALTHCARE FSA UNSUBSTANTIATED CLAIMS



Additional notifications occur at the end of the year.

- **From Optum:** Four communications will be sent to affected participants. All communications will be sent via email; two will also be sent via U.S. Mail

If employees do not substantiate their claims by 12/31/2023, payroll withholding\* will occur.

- **From UW System:** One communication will be sent to affected participants in January 2024 to make them aware of the payroll withholding process

*\*Additional information about the process will be provided in January.*

# 2023 HEALTHCARE FSA UNSUBSTANTIATED CLAIMS



Employees with questions should contact Optum directly. Due to the complexities of the process, Optum is the most appropriate contact for employee questions.

## UW System Resources:

- [FSA Unsubstantiated Claims web page](#)
- Portal articles:
  - What is an Explanation of Benefits?
  - FSA Claims Deadlines and Substantiation



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

# PAYROLL DEDUCTION SCHEDULE CHANGE: BENEFIT INSURANCE PREMIUMS – TERMINATING EMPLOYEES



- With benefit insurance premiums changing to be deducted the same month of coverage, some terminating employees may not have sufficient funds on the second paycheck of the month to support the remaining insurance premiums due
- Starting in December, UW-Shared Services will run a report to find employees who are terminating during the pay period of the second payroll to determine if enough funds are available to pay employee insurance premiums
  - The report will be run the Friday before the pay calc week of the first paycheck paid in the month. To ensure employees are picked up on the report accurately, update Expected Job End dates by the Thursday before the pay calc week.
- If an employee will not have sufficient earnings to cover insurance premiums on second paycheck of the month, paylines will be added to the first paycheck paid in the month to double employee insurance premiums. Payline overrides will be added to the second paycheck paid in the month to stop employee insurance premiums from being deducted.



QUESTIONS?







# SH REPORTS TO PROCESS UPDATES

- Final SH Reports To templates distributed November 1<sup>st</sup>
- Templates due by November 27<sup>th</sup>
- SH Reports To query



# TICKET REMINDER

When sending an email to service operations, [serviceoperations@support.wisconsin.edu](mailto:serviceoperations@support.wisconsin.edu), remember to include the following critical information:

- Full legal name (First & Last Name)
- Employee Empl ID
- Employee Record

If seeing unexpected results or error messages, include a screenshot

# CAMPUS COLLABORATION & DISCUSSION



For discussion topics, please email

[uwss-svc.CampusCallSlides@uwss.wisconsin.edu](mailto:uwss-svc.CampusCallSlides@uwss.wisconsin.edu)



THANK YOU