OCTOBER NSC NETWORK
AGENDA

> Welcome
  – Kanani Donaldson, Training Manager, ISC

> Changes in Workday for Open Enrollment 2019
  – Erin Snoeren, Application Manager/Benefits

> Open Enrollment Tips
  – Chelsea Tatum, Customer Support Supervisor, ISC

> Benefits Information
  – Ginny Montgomery, Director of Benefits Operations

> Time Entry Reports
  – Katie Savoie, Payroll Manager, Facilities

> Open Question and Answer
OPEN ENROLLMENT FOR 2019

Erin Snoeren, ISC Application Manager / Benefits

UNIVERSITY of WASHINGTON
INTEGRATED SERVICE CENTER
AGENDA

> What’s new for Open Enrollment 2019?
> Demo
WHAT’S NEW

> Spousal Redesign
> HSA Redesign
> FSA/DCAP/HSA deduction calculation for shorter service periods in OE (ex: 9-month people will have 18 pay periods in OE event)
> New dependent type of Stepchild (Not Adopted)
> Eligibility based on work address
> UMP Plus Plans not available in Grays Harbor County
> View My Open Enrollment Submission
INBOX ACTION ITEM

Change Benefits for Open Enrollment
PEBB Open Enrollment for Faculty, Fernando - Step 1 of 4

Event Date: 11/1/2018
Issued On: 10/30/2018
Emailed To: 11/1/2018

Make your changes during Open Enrollment (November 1 – 30). Changes go into effect January 1, 2019.

For instructions on how to enter your changes in Workday, see the User Guide:
- Click or select PEBB medical coverage or change your medical plan (and updating your HCFA 1500 form)
- Remove the Family or Dependent Dependent or Charge Coverage/Premium Suspension
- Update your Tobacco Use Premium Suspension at the newly added dependents
- Change your dental plan (and updating your HCFA 1500 form)

As a state employee, you are offered benefits through the State of Washington, governed by the Public Employee Benefits Board (PEBBs). Your benefits are administered by the University of Washington, through Workday. For information about your PEBB benefits, review the 2019 Employee Benefits Guide or the PEBB Plan Contact Information.

Declining/Withdrawing Medical Coverage:
To decline/withdraw PEBB medical coverage, you must be enrolled in other medical coverage (through another employer based group medical plans, TRICARE or Medicare).

Dependent Coverage:
When enrolling dependents in your PEBB medical or dental coverage, you must complete PEBB’s definition of a dependent. For employees and family members instructions, see the User Guide.

IMPORTANT: To avoid your dependent(s) in PEBB medical coverage, their eligibility or attachment documentation in Workday. Look for the “Attachment” step on the final enrollment screen to attach valid documentation. The UW will not be able to successfully enroll your dependent without the valid, attached documentation.

- All valid dependents, whether dependent notification is on record or not, will be enroled
- Eligible dependents age 26 or older - see complete Certification of Dependence on Eligibility forms, refer to the WU Employee Benefits Guide for eligibility information.
- Non-citizen dependents: For example, a non-citizen dependent partner or former partner of a U.S. citizen, and the non-citizen is not a student.
- Eligible dependents age 26 or older - see complete Certification of Dependence on Eligibility forms, the form bidder does not need a dependent notification.

If the Spouse or State Registered Domestic Partner Eligible Premium Subsidy:
IMPORTANT: When newly enrolling a spouse or state registered domestic partner (SRDP), you must obtain the premium subsidy, and you may be required to wait until every year as long as their income levels were on your PEBB medical.

Confirm your spouse or state-registered domestic partner in PEBB Eligibility of a dependent. For step-by-step Workday instructions, see the User Guide.

The State of Washington requires that you pay a 50% monthly premium in addition to your medical plan premium if you have a spouse or SRDP enrolled on your PEBB medical plan, and they have chosen not to enroll in their own employer-based group medical insurance. This supplements the premium subsidy to the NRS Office of the Executive. If you do not enroll in this plan, you may be subject to the 50% monthly premium charge to be billed from your paycheck. For more information, review the 2019 Premium Subsidy Fact Sheet.

At the time of tobacco use premium subsidy:
IMPORTANT: You must enroll to tobacco use or any newly added dependent.
<table>
<thead>
<tr>
<th>Change</th>
<th>External Links</th>
</tr>
</thead>
<tbody>
<tr>
<td>Benefits</td>
<td>UW Benefits</td>
</tr>
<tr>
<td>Dependants</td>
<td>UW Integrated Service Center - Benefits</td>
</tr>
<tr>
<td></td>
<td>PEBB Employee Site</td>
</tr>
<tr>
<td></td>
<td>Department of Retirement Systems</td>
</tr>
<tr>
<td></td>
<td>Fidelity</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>View</th>
<th>Current Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>View My Open Enrollment Submission</td>
<td>Change Open Enrollment</td>
</tr>
</tbody>
</table>
TIPS AND TRICKS FOR OPEN ENROLLMENT 2019

> Check UW Email Throughout the Month
  – Workday notifications can also be found by clicking the ‘bell’ icon

> Dependent Verification
  – Must upload sufficient documentation for all newly enrolled dependents
  – Marriage date required when enrolling a spouse

> Review Last Step Before Submitting
  – Pause and review
    > Do you have the plans you want?
    > Are your dependents listed for medical and/or dental?
  – Make sure to select the “I Agree” checkbox and select Submit
OPEN ENROLLMENT RESOURCES

> Open Enrollment 2019 page
  – Located on the ISC website
  – https://isc.uw.edu/open-enrollment-for-2019/

> A Guide to Understanding Open Enrollment

> Open Enrollment Fact Sheet
BENEFITS ELIGIBILITY

Ginny Montgomery, Director of Benefits Operations
BENEFITS ELIGIBILITY

> Benefits eligibility has changed since Workday implementation, based on changes made at the state level
> Additional changes coming for Temporary Employees will impact benefits eligibility
> Benefits eligibility is about the person, not the position
> TEF forms are only ONE part of benefits eligibility and should NOT be used to inform an employee of their eligibility
> Loss of benefits eligibility is as important as gain of eligibility and needs TIMELY data in Workday, especially for hourly employees
TIME ENTRY REPORTS

Katie Savoie, Payroll Manager, Facilities
PAYROLL DEADLINES

> Departmental payroll deadline is 11:00am on:
  – 1st for the 16th – 30th/31st pay period
  – 16th for the 1st – 15th pay period

> What is required by this deadline:
  – Approving all time & leave entries in Workday
  – Submitting anything else impacting the current payroll (ex. Compensation Changes, Hires, Termination, etc.).
GO TO REPORTS

> R0283 Unapproved Time in a Pay period
  – Shows: Not Submitted & Submitted (not approved) Time
  – **Supervisor & Managers** pull weekly and before our 11:00am payroll deadline (1\textsuperscript{st} & 16\textsuperscript{th})
  – **Payroll Team** pulls daily from the 11:00am deadline to the Time & Absence Transaction deadline
    > Payroll pulls report twice (AM & PM) on Time & Absence Transaction deadline

> What to look for?
  – Status: Not Submitted or Submitted
GO TO REPORTS

> R0017 Validate Time Reported Matches Weekly Scheduled Hours
  – Shows: Missing Time not entered or not approved
  – Supervisor & Managers pull weekly and before our 11:00am payroll
deadline (1\textsuperscript{st} & 16\textsuperscript{th})
  – Payroll Team pulls daily from the 11:00am deadline to the Time & Absence
    Transaction deadline

> What to look for?
  – Calculated Difference other than 0 hours
  – Go to employee’s Enter Time Screen to check the week
Tips for this report:
- Start & End Date: Monday – Sunday (ex. 10/15 – 10/21)
- Ok if last week is not Monday – Sunday (ex. 10/29 – 10/31)

How I sort this report
GO TO REPORTS

> R0101.2 Earnings & Actuals – Prompt for Organization
  – Pull the day before or day of Time & Absence Transaction deadline

> What to look for?
  – Check Exception Pay especially overtime
    > Make sure overtime was not an entry error
  – Go to employees’ Enter Time Screen to check the week
WHY THESE REPORTS

HOW I STARTED USING THESE REPORTS

> R0017 Missing Time & R0283 Unapproved Time
  – July 2017 started using these reports
  – October 2017 supervisors began pulling these reports

> R0101.2 Earnings & Actuals
  – Used since go-live to check after payroll was processed
  – June 2018 started checking all exception pay before payroll is processed

> Reverse Engineering Over/Under Payments
COMMUNICATION STRATEGY

> Departmental Payroll Deadlines (11:00am 1st & 16th)
  – Sent out updated calendar each year
  – Payroll deadline reminder sent out 3 days before
  – Set expectations for supervisors to meet this deadline

**Payroll Cutoff Calendar.**

**Please Note:** Timecards must be approved by 11:00AM, the morning of the cutoff date.

<table>
<thead>
<tr>
<th>Pay Period</th>
<th>Cutoff Date</th>
<th>Pay Day</th>
</tr>
</thead>
<tbody>
<tr>
<td>09/16/2018 - 09/30/2018</td>
<td>Mon, 10/01/2018</td>
<td>Wed, 10/10/2018</td>
</tr>
<tr>
<td>10/01/2018 - 10/15/2018</td>
<td>Tue, 10/16/2018</td>
<td>Thu, 10/19/2018</td>
</tr>
<tr>
<td>10/16/2018 - 10/31/2018</td>
<td>Thu, 11/01/2018</td>
<td>Fri, 11/09/2018</td>
</tr>
<tr>
<td>11/16/2018 - 11/30/2018</td>
<td>Mon, 12/03/2018</td>
<td>Mon, 12/10/2018</td>
</tr>
<tr>
<td>12/01/2018 - 12/15/2018</td>
<td>Mon, 12/17/2018</td>
<td>Mon, 12/24/2018</td>
</tr>
</tbody>
</table>
QUESTION & ANSWER
If an employee receives the Open Enrollment in their Workday Inbox and doesn’t respond, what happens?

- If the individual does not respond, what they selected for the previous year will roll over for medical and dental.
- They would still need to elect FSA/DCAP if they want to be enrolled in 2019.
- There are 4 spousal surcharge attestations that need to re-attest, who have been directly communicated to by the HCA and the University. If they do not re-attest, they will be charged the spousal surcharge.

Last year employees were confused on what to do if they DO NOT need to make changes. How do we make that more clear this year?

- If you have a spouse enrolled in medical and are notified that you need to re-attest, and/or want participate in FSA/DCAP, then the individual needs to respond to the Action item in their Workday Inbox. If the individual DOES NOT participate in any of these, there is NOTHING they need to do, unless they want to make changes.
CHANGES IN WORKDAY FOR OPEN ENROLLMENT

> If you do nothing, will the Action item in your Inbox go away?
  – The Action will stay in the Inbox for the entire month of November. It will ‘disappear’ when Open Enrollment closes at midnight, November 30.

> Last year when employees did call the ISC with Open Enrollment questions, they had a hard time getting a hold of someone to talk to.
  – We’re making every effort possible to ensure campus can receive assistance with Open Enrollment questions. Tier 1 is working diligently to ensure they are prepared/educated to answer as many questions as possible. If you do not want to call, an email/ticket is preferred and will be addressed as quickly as possible.
  – **NOTE:** Based on last year’s call volumes during Open Enrollment, the busiest times for calls are typically between 10:00 a.m. - 12:00 p.m.
When an employee gets their notification of benefits eligibility, is that when the 30 day window starts?

- It's 31 days from the start of eligibility. If they are eligible during the second pay period of the month, they'll be eligible starting the next month. If the employee gains eligibility during the second half of the month, we don't know until payroll closes. Second half of the month, they may not get the full 31 days. We are trying to have the notice completed within in 21 days.

The concern with not educating HR Partners about benefits eligibility is that we get the questions from new employees regarding benefits requirements and information in their letters.

- For a Regular staff employee, that are 50% or greater, they're covered. The rule changes impact more the hourly employees. While this position is not natively eligible, your employment history at the University may make you benefits eligible.
- If you have an employee that receives notification that they are eligible, have them respond as soon as they can.
When answering the first 2 questions on the TEF questionnaire, it states they are eligible, does that mean the employee will get benefits?

- The TEF question is about the person, not their position. If you do answer the TEF questions and they gain eligibility, then yes, they are eligible.

The offer letter templates on the HR website contain language about benefits eligibility.

- We will work with HR about editing the language.
We had a permanent employee who was getting ready to leave and transitioned into a temporary hourly position. When this was done, it sparked the I-9. We were told that this was because the employee was originally hired prior to implementing Workday. Is this true?

> Yes. For employees whose hire dates precede the implementation of Workday, if they have a job change, it will spark the I-9 so the University can have a digital version of the I-9.

What about employees who were hired post-Workday. If they have a job change, will it spark the I-9?

> Yes, it will create an Action for section 3 of the I-9.

We have had faculty who have retired and come back to work and this will create an Action for gathering documentation for the I-9. This can be problematic, even insulting, when a retired faculty member, or emeritus faculty member, is being asked to provide I-9 documentation. Are they still required to do this?

> Yes, to be federally compliant as a University, we need to have that documentation on file.
Follow up question to the previous question regarding I-9’s. What are the consequences if we don’t have the documentation on file for the I-9?

- The consequences are if the University is audited, we can be fined, which has happened before. Even our emeritus faculty, when they come back to teach, we need to get their documentation so the University can have them properly documented in Workday.

Is this necessary even if we’re hiring them as an unpaid academic?

- **Correction from the meeting:** Unpaid academics DO NOT require an I-9. For more information about this, please see the I-9 Coordinators page.
  - [https://isc.uw.edu/admin-corner/i-9-coordinators/](https://isc.uw.edu/admin-corner/i-9-coordinators/)

Conversations with faculty who have been with the University for decades can be very uncomfortable when asking them for I-9 documentation. It would be helpful to have some language to help us explain why it is necessary.

- Absolutely! We can work with our partners in HR and Academic HR to create some helpful language for these uncomfortable conversations.
I have been hesitant to hire or transition retired emeritus faculty into an unpaid academic job in fear that they will lose their retirement supplement. If they have an unpaid academic job, will this impact their retirement supplement?

- Having an unpaid academic job will not impact their retirement supplement. The retirement supplement is coming from the benefits configuration space. So you don’t have to worry about jeopardizing their retirement supplement by changing them into an unpaid academic job.

- Recommendation: communicate and inform your employee/faculty member about the process, how it is being initiated, set their expectations, remember the employee just wants to be informed. With the communication, it makes it easier for them knowing they have someone to go to with questions/issues. They feel a bit better with the process.
If you have supervisors/managers that are not as attentive to paying attention to logging into Workday to approve time, if they approve unpaid time late, will Workday pick that up and pay them?

- If unapproved time is approved late, it will be picked up on the next payroll. If the employee is going to get a check, it would come out of that one.
- If you have unapproved time off and payroll runs, and then you approve the unpaid time off later, retro will pick it up and automatically deduct it from the employee’s next paycheck.
- If the employee understands that they should not have been paid and are fine with it being taken out of their next check, let payroll run and there is no overpayment paperwork to be done. If the employee does not want it taken out of their next check, then you will have to fill out the overpayment paperwork.
- Please also refer to the Manager’s page on the ISC website

https://isc.uw.edu/managing-your-teams/workday-for-managers/
There seems to be quite a bit of inconsistency with one-time payments and faculty, especially around reason codes. This has created a lot of back and forth to get them approved. And what should be a very seamless process, we have noticed can take 4-8 weeks. And with some of these needing to be approved by people at a very high level, it’s frustrating to have them repeatedly log back into Workday to approve something that they have already approved before. Can this be fixed, or investigated?

– We are working with our partners at Academic HR, since they control the policies around different compensation types for faculty, to provide more resources and guidance up front, to avoid the ‘back and forth’. More to come!

Regarding how Katie’s Sup Orgs are structured and security roles, how do you have those set up so supervisors/manager can take ownership of running those reports?

– All of our supervisors/managers have the Time and Absence Approve role, as well as Time and Absence Initiate roles, with the caveat that they cannot edit time. They can run reports like R0017 and other time entry reports.
What about students who take the summer off and return every fall? Will they have to submit an I-9 every year?

- In the scenario where they have been terminated and being rehired since the implementation of Workday, it will spark section 3 of the I-9. So there will be some I-9 information the student will need to submit.

As a suggestion, could we get more resources, such as decision trees, to help determine which reason codes to use for what? Not just for one-time payments, but for more reason codes we use/see in Workday?

- Yes. This is something the ISC, along with other campus partners, we can work on to provide campus. It won’t happen overnight, but we have started already ‘diving deeper’ into the reason code inventory and we can take a look at creating more resources to help identify which ones to use and what they mean.
Will the ISC be sending out reminders to employees who have not taken their personal holiday before the end of the year?

- No, the ISC will not be sending out a notification. Departments are encouraged to run report R0331 that will show which employees still have a personal holiday. Then, the department can reach out to those employees to remind them that they still have a personal holiday and if not used by the end of the year, they will lose it. Personal holiday do not carry over, they are ‘use it or lose it’.

Prior to Workday, if an employee wanted to donate shared leave, the budget administrator had to sign off, or approve it first, so they knew how it was going to impact the budget. Departments could also work with the employee to verify how much they had to donate. Now that the budget administrators do not sign off, they don’t know it’s happening. Is there a notification they can get to let them know?

- Recommendation: Departments work directly with the employee who wants to donate the leave, and have them give the department the ‘heads up’, so they can ensure the appropriate number of hours are being submitted.