

# HR/CMS User Group

September 14, 2022



OFFICE OF THE COMPTROLLER  
COMMONWEALTH OF MASSACHUSETTS



# Welcome

- ★ Chat function is disabled
- ★ Mute function is enabled
- ★ Closed Captioning is on
- ★ Q&A
- ★ Recorded

# Agenda

- I. Welcome**
  - I. Remarks – William McNamara, Comptroller**
- II. Metro Credit Union**
- III. HR/Payroll Announcements**
- IV. Empower Retirement - SMART Plan**
- V. Payroll Reminders**
- VI. Benefit Strategies – Qualified Transportation & FSA**
- VII. Calendar Year End Preparation**

# Opening Remarks

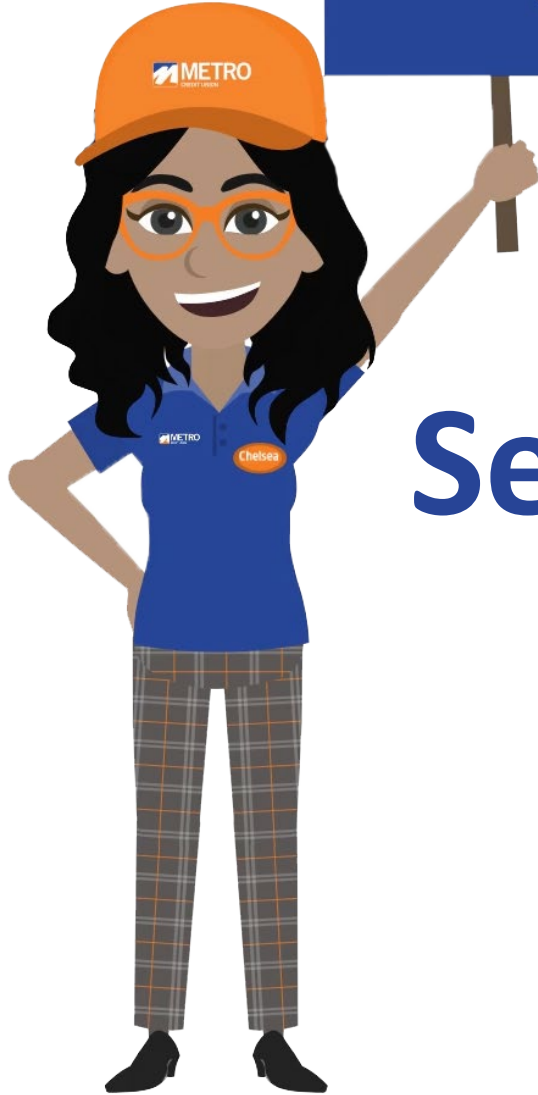
Comptroller William McNamara

# Metro Credit Union

Mary Holland



*The credit union for  
Massachusetts State Employees*



# September 2022 Updates



# Take Advantage of Certificate of Deposit Specials

## THE SAFEST PLACE FOR A GUARANTEED RATE!

15 Month CD Special **2.25%** APY\*

18 Month CD Special **2.50%** APY\*

24 Month CD Special **3.00%** APY\*



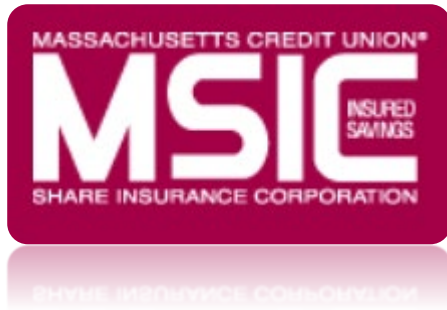
**Only \$500 to get started!** Open yours at [MetroCU.org](https://MetroCU.org) or any Metro location.

Chelsea | Boston | Burlington | Dorchester | Framingham | Lawrence | Lynn | Medford  
Melrose | Newton | Peabody | Reading | Salem | Tewksbury | West Roxbury

[MetroCU.org](https://MetroCU.org) | 877.MY.METRO

Insured by NCUA | Member MSC \*Annual Percentage Yield (APY) is accurate as of 08.24.2022 and subject to change at any time without notice. \$500.00 minimum to open. \$0.01 minimum to earn the APY. A penalty will be imposed for early withdrawals. Fees may reduce earnings. Account requires new money; to satisfy this requirement, an additional \$5,000 in external funds must be added to transfers from existing Metro Credit Union accounts. For online account opening only. Maximum funding amount is \$25,000. Visit MetroCU.org for current rates, terms and account requirements.





Balances above the federal limit, currently \$250,000, carry additional deposit insurance through MSIC. With Excess Share and Deposit insurance, credit union members can deposit large balances without needing to worry about diversification.



# Expanding Our Financial Wellness Program





# Last Chance for Grand Opening Specials at New Locations

- **\$1,500 off Mortgage Closing Costs**
  - Offer expires September 30<sup>th</sup>
- **Open a My Reward Checking and Get \$300**
  - No ATM fees, plus no monthly service fee for 6 months, then reimbursed with direct deposit
  - Offer expires June 30<sup>th</sup>
- **Earn up to \$250 more when you Refer-a-Friend who opens a My Reward Checking account**



# New Locations:



**BOSTON - DORCHESTER**  
960 Morrissey Boulevard



**BOSTON - WEST ROXBURY**  
1985 Centre Street



**MEDFORD**  
1 Salem Street



**PEABODY**  
240 Andover Street



**READING**  
470 Main Street



**BURLINGTON**  
50 Summit Drive



**MELROSE**  
108 Main Street



## Always Available to You:



Mary Holland, CCUFC  
*Sr. Business Development Officer*  
[MHolland@MetroCU.org](mailto:MHolland@MetroCU.org)  
877.MY.METRO ext. 3504

# HR/Payroll Announcements

Tryntje Bumgardner

# Department Location Code

- ★ **Location codes indicate the geographic and physical location of where an employee works. They are required and are maintained jointly by the Human Resources Division and the Office of the Comptroller.**
- ★ **The location code is entered when a position is established and must be updated if the position moves from one address to another.**
- ★ **In HR/CMS, they are used for some Time & Labor rules processing and as criteria to sort printed pay checks/advices.**
- ★ **In MMARS, they are a programmatic Chart of Account element.**

# Updating Location Code

- ★ If a department is moving (permanently or temporarily), they need to update their location in HR/CMS and MMARS
- ★ HR/CMS Knowledge Center has job aids and resource documents related to Location Codes under Position Data
- ★ <https://massgov.sharepoint.com/sites/HRD-HRCMSKnowledgeCenter/SitePages/Human-Resources-Job-Aids.aspx>
- ★ MMARS requests should be



# Paid Family Medical Leave

- ★ All Commonwealth employees are eligible for PFML
- ★ Employees can apply for PFML leave starting 60 days before their leave will start
- ★ Employees who experience the need for sudden or unexpected leave, may apply for retroactive PFML
- ★ PFML and FMLA run concurrently
- ★ Employees may not “buy back” paid leave which they used prior to PFML

# Wage Act Clarification

- ★ If an employee voluntarily resigns from their position, they should be paid in full on the next regular payday or by the first Saturday after their last day of work (if there is no regular payday)
- ★ If you plan to fire an employee, you should consult with your general counsel before terminating the individual to determine whether the Wage Act applies.
- ★ Employees who are fired and who are subject to the Wage Act must be paid in full on their last day of work. The final check must include all hours worked, including overtime, differential, accrued vacation leave and calculated accruals up to the date of discharge.
- ★ If you are unable to calculate the amount of the final check prior to the employee's last day, consult with counsel about whether you may suspend the employee without pay until you can calculate the amount of the final check.

# Wage Act Resources

- ★ <https://www.mass.gov/info-details/massachusetts-law-about-wages>
- ★ <https://www.mass.gov/guides/pay-and-recordkeeping>
- ★ **Departments should log a ticket in ServiceNow to request assistance with calculating final paychecks prior to discharging employees**

# Questions

# SMART Plan

Robert Young

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# Commonwealth of Massachusetts SMART Plan Update



## Payroll User Group Meeting

September 14, 2022



# SMART Plan Agenda

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Karl Kroner

Client Relationship Manager

- OBRA Changes
- Market Volatility
- Retirement Plan Advisor
- Questions

# OBRA Investment Options

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- Currently only Capital Preservation Fund
- Beginning October 1, 2022:
  - SMART Path Target Date Funds
  - Managed Account
- Participants will still default into the Capital Preservation Fund
- Can choose additional options only after initial enrollment



# Market Volatility

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## We're Here to Help Your Employees



- Steps to help you get back on track
- Saving and investing review
- Planning ahead
- Retirement Readiness Reviews through Webex or phone or worksite
- Schedule appointments; ***SMART@Empower.com*** or ***Mass-SMART.com***

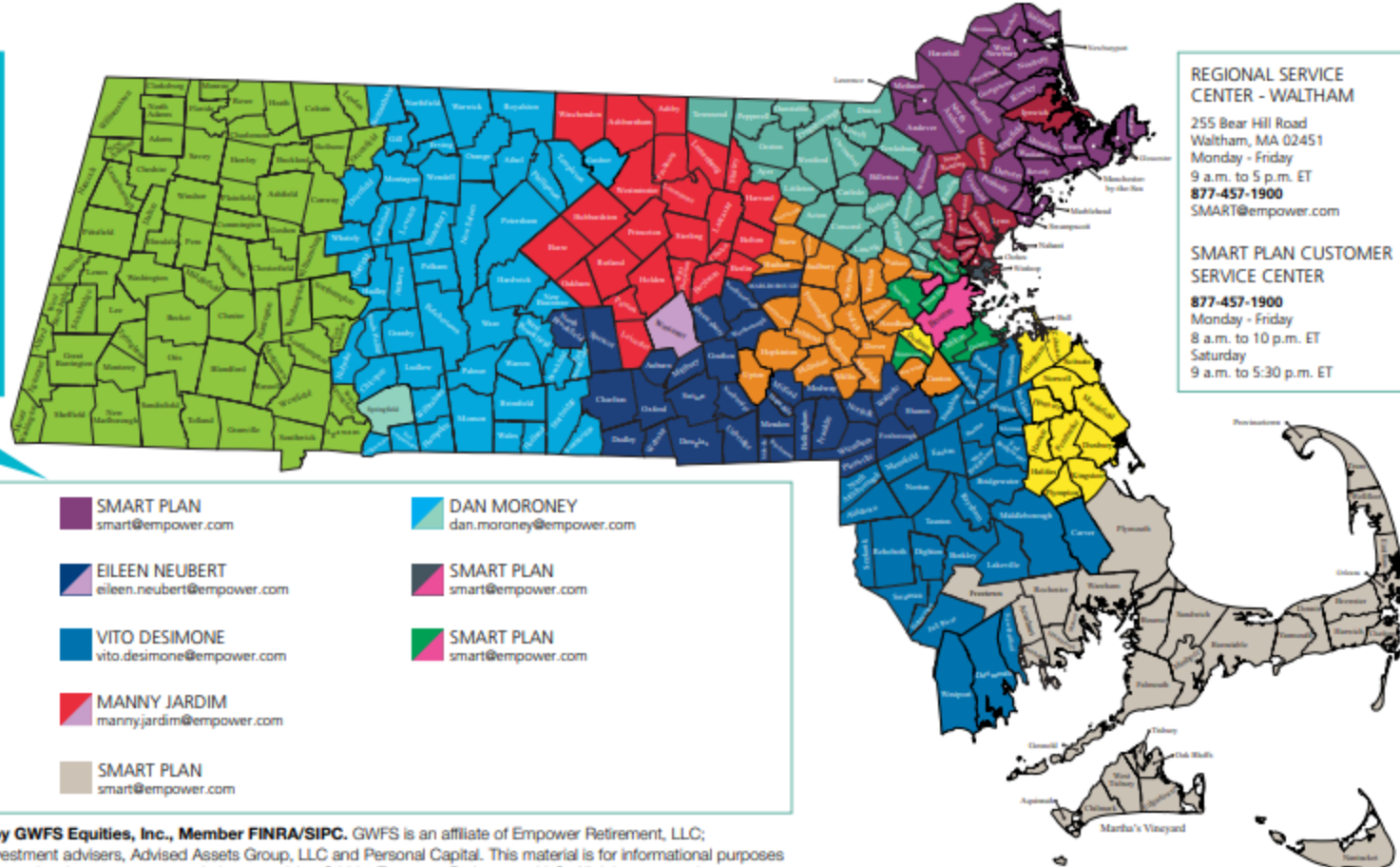
# Retirement Plan Advisor Map



## SMART Plan Territory Map

M A S S A C H U S E T T S D E F E R R E D C O M P E N S A T I O N S M A R T P L A N

Click on your Retirement Plan Advisor's name to schedule an appointment. Your Retirement Plan Advisor can help answer general questions about retirement savings, review your retirement strategy and explain the benefits of the SMART Plan.



### REGIONAL SERVICE CENTER - WALTHAM

255 Bear Hill Road  
Waltham, MA 02451  
Monday - Friday  
9 a.m. to 5 p.m. ET  
**877-457-1900**  
SMART@empower.com

### SMART PLAN CUSTOMER SERVICE CENTER

**877-457-1900**  
Monday - Friday  
8 a.m. to 10 p.m. ET  
Saturday  
9 a.m. to 5:30 p.m. ET

SEAN DOUCETTE sean.doucette@empower.com	SMART PLAN smart@empower.com	DAN MORONEY dan.moroney@empower.com
VINCE GOSSELIN vincent.gosselin@empower.com	EILEEN NEUBERT eileen.neubert@empower.com	SMART PLAN smart@empower.com
MARIANNE COLE marianne.cole@empower.com	VITO DESIMONE vito.desimone@empower.com	SMART PLAN smart@empower.com
MICHAEL O'BRIEN michael.obrien@empower.com	MANNY JARDIM manny.jardim@empower.com	
ANDREW WILSON andrew.wilson@empower.com	SMART PLAN smart@empower.com	

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# Online Scheduler



Plan for a more secure and comfortable retirement with the **Massachusetts Deferred Compensation SMART Plan** —  
Take advantage of a personalized review  
at no additional cost to you.

Get help determining:

- *How your assets are allocated*
- *Your savings rate*
- *The amount or percentage of your pre-retirement income you may need to replace*
- *Your planned retirement age*
- *Your retirement readiness*



Contact your local Retirement Plan Advisor to set up  
an enrollment meeting or a 1-on-1 Retirement Readiness Review  
that is convenient for you.

[\*\*CLICK HERE TO SCHEDULE\*\*](#)



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Securities offered or distributed through GWFS Equities, Inc., Member FINRA/SIPC and a subsidiary of Great-West Life & Annuity Insurance Company. Retirement products and services provided by Great-West Life & Annuity Insurance Company. Corporate Headquarters: Greenwood Village, CO; Great-West Life & Annuity Insurance Company of New York, Home Office: New York, NY, and their subsidiaries and affiliates, including registered investment advisors Advised Assets Group, LLC and Great-West Capital Management, LLC. ©2018 Great-West Life & Annuity Insurance Company. All rights reserved. 98998-PLN-14837-1808 JMK/21/02-0008

[www.mass-smart.com](http://www.mass-smart.com) | (877) 457-1900

# Questions?

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Thank you

# Payroll Reminders

Eduardo Canton

# Correction Mode in HR/CMS

- ★ Correction mode will only be used to make changes when an employee's pay, creditable service, or GIC status is affected
- ★ While we understand that mistakes are made, every effort should be made to confirm appropriate data entry into HR/CMS before completing actions
- ★ Avoid future dated termination transactions in Job data
- ★ When entering a new row in job data please make sure to use the correct effective date as the system defaults to the current date
- ★ Where possible, insert a new row with the same effective date and new sequence number instead of asking for correction

# Deficiency Payroll

- ★ Prior year payments are authorized expenses that were incurred in a prior fiscal year, but the Department did not recognize that these expenses were incurred, or the expenses were recognized after the end of the accounts payable period
- ★ Prior year deficiency payments must be submitted and authorized by the Office of the Comptroller
- ★ The Department's current fiscal year account is charged back by the Office of the Comptroller to support the expenditure
- ★ [Procedures for HR/CMS LCM Payroll \(macomptroller.org\)](https://macomptroller.org)

# PKF (Federal) and PKS (State)

- ★ Federal and State laws require employers to include Fringe Benefit income on annual W-2 forms
- ★ Such fringe benefit income includes an employee's use of qualified employer provided parking in Commonwealth owned garages or leased parking
- ★ The amount required to report for W-2 purposes is the value of the monthly qualified parking that exceeds the monthly exclusion amount
- ★ The Federal exclusion amount for tax year 2022 has increased \$10 to \$280 per month
- ★ The State (Massachusetts) exclusion amount for tax year 2022 has increased \$10 to \$285 per month



# Benefit Calculation

- ★ Departments are responsible for determining PKF and PKS amount that needs to be entered into Additional Pay
- ★ For example, if the value of the employer-provided free parking is \$A per month and the monthly exclusion is \$B, the Commonwealth is required to report the excess value \$C
  - $\$A$  (Monthly Value) -  $\$B$  (Monthly Exclusion) =  $\$C$  (Taxable Benefit)
  - Therefore, \$C would be added to the employee's gross income for Federal and State tax reporting purposes
  - Note: if \$A is less than \$B, then nothing will be added for \$C

# Parking Resources

- ★ For processing Non-Cash Parking Benefits in HR/CMS please refer to job aid: [ProcessNon-CashParkingBenefits.docx\(sharepoint.com\)](#) under the section “General Deductions”
- ★ Beginning PPE 4/23/2022 and moving forward PKS should be entered
- ★ Please do not disregard emails from CTR regarding parking issues
- ★ CTR will address PKS state tax liability from January - April 2022

# Questions

# Benefit Strategies

Angela Thivierge

# GIC Flexible Spending Account (FSA) Programs

PUG Meeting Agenda September 14th, 2022

- Important Plan Year Dates
- New Hire Enrollments
- Status Change Process Overview
- Coordinator LOA form
- Refund/Reclassification Requests Overview
- Coordinator Termination Process Overview





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## GIC FY2022 Plan (Ending)

**Plan Year:** July 1, 2021 – June 30, 2022

**Grace Period:** September 15, 2022

**Claims Filing Deadline:** October 15, 2022

## GIC FY2023 Plan (Current)

**Plan Year:** July 1, 2022 – June 30, 2023

**Grace Period:** September 15, 2023

**Claims Filing Deadline:** October 15, 2023

**\*\*Submissions received after the **Claims Filing Deadline** will not be accepted. Please remind employees of this\*\***

HCSA \$250-\$2,850 \*IRS Maximum HCSA election amount

DCAP up to \$5,000 per plan year \*Maximum Per Pay Period: \$96.15 Weekly ; \$192.30 biweekly



# New Hire Enrollments

www.benstrat.com/gic-fsa/

60 day waiting period for HCSA benefit; refer to calendar for HCSA effective date for new hires. No waiting period for DCAP benefit; effective immediately from date of hire.

- Enrollments received after 21calendar days from the date of hire will be denied
- A confirmation email will be sent to GIC Coordinator to enter the enrollment into the payroll system
- If inaccurate effective dates and/or information is found –email [Dataseservices@benstrat.com](mailto:Dataseservices@benstrat.com)

### Reminder

All enrollment must be done online by the member  
Employee completes election/enrollment e-form

# Coordinator Reminders

- Make sure the number of payroll deductions are accurate for a mid-year enrollment
- Provide Guidance on FSA Benefit
- Provide FSA Member Handbook - [2023 GIC FSA Handbook](#)

## E-Form for New Hire

**GIC Flexible Spending Account New Hire Enrollment**

Name\*  
   
 First Name Last Name

Employee ID Number\*

Hire Date\*  
     
 Enrollment must be within 10 days of your hire date.

Social Security Number\*

Date of Birth\*

Email\*

Daytime Phone\*

Address\*  
  
 Address Line 1

City State ZIP Code

Agency Type\*

Your election must be submitted within 10 days of your hire date.



# Process Overview – Status Change Request form

www.benstrat.com/gic-fsa/

## Member Submits Request



- Status Changes must be submitted by the participant within 60 calendar days after the event occurs
- Please direct employees to the [status change form](#) on our website
- If the employee is reporting start of LOA and would like Direct Bill or Pre-Pay –the form must be submitted/approved prior to the start date in order to qualify for these options.

## Coordinator Approves/Denies



- Once the employee submits the request, the coordinator designated to your agency will receive an email with instructions on how to submit approval or denial

## Coordinator Gathers and Uploads Documents

- Supporting documentation **is required** for all Status Changes and **must be uploaded by the coordinator when responding to the request**



**The GIC Coordinator is responsible for updating payroll deductions accordingly.**

## E-Form for Coordinator Approval

The screenshot shows the 'GIC FSA Status Change Approval' form. At the top, it features the logos for the Commonwealth of Massachusetts Group Insurance Commission and benefit strategies. The form title is 'GIC FSA Status Change Approval'. Below the title, there are several input fields: 'Request Submission ID \*' (a text box), 'Employee Name \*' (a text box), and two dropdown menus for 'First Name' and 'Last Name'. Underneath these is a 'Required Documents \*' section with a 'Choose File' button and the text 'No File Chosen'. Below that is a note: 'File uploads may not work on some mobile devices.' The 'This Request Is \*' section has two radio button options: 'Approved' and 'Denied'. At the bottom of the form, there is a back arrow button and a 'Submit Form' button.





## Coordinator LOA form

[www.benstrat.com/gic-fsa/](http://www.benstrat.com/gic-fsa/)

- Prior to submitting this form discuss all LOA options with the participant prior to the start of their leave
- When reporting the 'Start of LOA' it must be received prior to the first day of the leave in order to elect Direct Bill or Pre-Pay
- When reporting 'End of LOA' ensure you are also adjusting deductions in HRCMS if 'Pay Upon Return' was selected

Form can be found under Coordinator Resources:

<https://www.benstrat.com/gic-fsa/>

## Coordinator Reminders

- This is not in place of the Status Change Request form. Participants are still able to report Start/End of LOA by submitting the Status Change Request form
- Multiple forms may be needed depending on the progression of the LOA ie paid to unpaid or unpaid to paid
- Supporting documentation/approval is not needed
- Notification email is sent to the participant once a form is submitted outlining what was selected

### Changes to/Enrollment in FSA Accounts | Beginning or Ending Leave of Absence (LOA)

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Name of Coordinator completing form *		Employee Name *	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
First Name	Last Name	First Name	Last Name
Employee Daytime Phone *		Employee Social Security Number *	
<input type="text"/>		<input type="text"/>	
Employee Email *			
<input type="text"/>			
Employee Email Address is required to notify them of this form being submitted on their behalf			
Agency Type *			
<input type="text"/>			
Employee Home Address *			
<input type="text"/>			
Address Line 1			
<input type="text"/>			
Address Line 2			
<input type="text"/>		State	ZIP Code
City			



# Process Overview – Refunds and Reclassification

[www.benstrat.com/gic-fsa/](http://www.benstrat.com/gic-fsa/)

## Agency Coordinator Submits Request



- Refund and Reclassification requests must be submitted using the online form, on our website, under Coordinator Resources section
- Must be submitted within 60 calendar days of the first deduction taken in error
- **You must provide details** –assume the reader has no information on the case/situation

**If inadequate details are provided, you risk denial of the request**

## GIC Approves/Denies



- GIC is sent requests bi-weekly for approval/denial.
- There is no appealing the GIC decision

## Notice of Approval/Denial Sent to Coordinator



- Coordinators receive an email informing them of the approval/denial.
- **You must communicate this to your employee**
- **You may not change or stop deductions unless you have received approval/denial confirmation**

## E-Form for Refund and Reclassification requests

The screenshot shows the 'Payroll Refund and Re-classification Request' form. At the top, it features the logos for the Commonwealth of Massachusetts Group Insurance Commission and benefit strategies. The form fields include:

- Employee Name\***: Two input boxes for First Name and Last Name.
- Employee ID\***: One input box.
- Agency Type\***: A dropdown menu.
- Deduction Codes\***: Three checkboxes for DCAP, HCSA, and HCSAF.
- Request Being Made\***: A dropdown menu.
- Date of Payroll Error\***: Three date input boxes.
- FSA Plan Year\***: One input box with a note 'e.g. FY2019, FY2020'.

At the bottom right, there is a 'Submit Form' button. A note at the bottom left states: 'Request must be made within 60 Calendar days of Payroll Error'.



## Process Overview – Coordinator Termination Form

[www.benstrat.com/gic-fsa/](http://www.benstrat.com/gic-fsa/)

E-Form for coordinators to report end of state employment on behalf of FSA participants

Form is ONLY used when employee has already ended employment and did not submit a Status Change form

Form can be found on our website, under “Coordinator Resources” Section here: [www.benstrat.com/GIC-FSA/](http://www.benstrat.com/GIC-FSA/)

### **\*\*As a reminder\*\***

**When an employee terminates employment their debit card is shut off & they will only be able to submit manual claims for services incurred on or before their last date of employment**

Job Aid available on Benefit Strategies website

E-Form for Coordinator Termination

### Coordinator Termination Form

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Former Employee's Name \* Former Employee's Last 4 Digits of Social Security Number \*

<input type="text"/>	<input type="text"/>	<input type="text"/>
First Name	Last Name	

Agency \*

Date State Employment Ended \*

<input type="text"/>	<input type="text"/>	<input type="text"/>	
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# Commonwealth Commuter Programs

PUG Meeting Agenda September 14th, 2022

- Benefit Strategies Website
- Enrollment Form -Enrollments, Changes, Drops
- FY23 Transit Process
- FY23 Parking Process





# Benefit Strategies Website

[www.benstrat.com/clients/Commonwealth/](http://www.benstrat.com/clients/Commonwealth/)

The Commonwealth of Massachusetts Commuter Transit & Parking benefits have their own dedicated page:

<https://www.benstrat.com/clients/commonwealth/>

Items found on this page are:

- Member login page
- Direct link to the election change E-Form
- FAQ
- Commuter Claim Form
- Process calendars

## Reminder:

It's All Online! No Paper Forms will be accepted!

## Commonwealth of Massachusetts

### Transit and Parking Reimbursement Accounts, Commonwealth of Massachusetts Employees

Benefit Strategies, LLC is excited to offer both Transit and Parking benefits to eligible employees of the Commonwealth of Massachusetts! We have added an enrollment form on this site that employees can submit via email directly to Benefit Strategies, which can be accessed by clicking the Election Change button below.

QTBP PARTICIPANT LOGIN

ELECTION CHANGE

LOOKING FOR GIC FSA ACCOUNTS?

The enrollment form allows for Transit and/or Parking election changes. The form takes approximately 3-5 minutes to complete and is designed to be extremely user-friendly. Since both Transit and Parking are payroll funded accounts, there are deadlines each month which are necessary in order to make changes to be effective for the following month. We have included a link next to each benefit with a schedule of when each month's deadline to enroll will occur. Please see the FAQ link for answers to other important and frequently asked questions.

- [QTBP FAQ for Transit and Parking](#)
- [FY2022 Transit Election Change Process Calendar](#)
- [FY2023 Transit Election Change Process Calendar](#)
- [FY2022 Parking Election Change Process Calendar](#)
- [FY2023 Parking Election Change Process Calendar](#)
- [Commuter Claim Form](#)

If you are filing a paper claim for reimbursement or sending any type of other correspondence, please use any of the following methods which you see fit:

- Email to [commonwealth@benstrat.com](mailto:commonwealth@benstrat.com)
- Fax to: 603-232-8079
- Mail to: PO Box 1300, Manchester, NH 03105-1300

Contact us: 1-877-353-9442



# Enrollment Form – Enrollments, Changes, Drops

www.benstrat.com/clients/Commonwealth/

- To enroll, make changes, or drop out – members must complete the Online Election Change E-Form
- E-Form can be found on our website - [here](#)
- Members are encouraged to review the Process Calendars for important deadlines
- If the agency coordinator receives an email notification for an employee that does not belong to their agency, please alert Benefit Strategies immediately –forward the email to [commonwealth@benstrat.com](mailto:commonwealth@benstrat.com)
- If a form is not filled out completely–you will not receive the notification email. Instead, you will receive an email informing you of this with instructions to provide to the employee

**The IRS Pre-Tax Transit and Parking limit for 2022 tax year is \$280.00 per month**

## Commonwealth of Massachusetts Qualified Transportation Benefit Plan

**Transit and Parking Reimbursement Accounts available for HRCMS and UMass employees.\***

\*Offline (999) agencies are not eligible for this benefit plan.  
Benefit Strategies, LLC is excited to offer both Transit and Parking benefits to eligible employees of the Commonwealth of Massachusetts. This enrollment form allows for Transit and/or Parking election changes.  
Please visit the [Qualified Transportation Benefit Plan FAQ](#) link for answers to other important and frequently asked questions.

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### Employee Information

Directions: Please select your agency from the box below to the left.

Department Code \*

Name \*  
   
First Name Last Name

Employee ID \*  
  
Check your paystub for your Employee ID#

Social Security Number \*

Today's Date

Home Mailing Address \*  
  
Address Line 1

City State ZIP Code

Email \*

Phone Number \*

Ext

\*A valid email address is required to remain on your account for the duration of your enrollment into the plan, or as long as you carry an available balance. Benefit Strategies will email you every month with a reminder to check your balance.



# FY23 Transit Process Calendar

www.benstrat.com/clients/Commonwealth/

TRANSIT ELECTION CHANGE PROCESS CALENDAR  
FY2023  
07/01/22-06/30/23

## [2023FY TRANSIT Election Change Process Calendar](#)

The deadline to submit the July 2022 Election Change E-Form was June 1<sup>st</sup> for the TRANSIT benefit.



This benefit month was processed via payroll yesterday, June 7<sup>th</sup> and will be deducted from the June 10<sup>th</sup> paycheck.

Funds will be credited to the debit card on June 20<sup>th</sup> to be used for the July benefit month.

Benefit Month	Requests Received by Benefit Strategies	Payroll Process Date	Paycheck Date	Funds Credited To Debit Card
July 2022	Weds. 06/01/22	06/07/22	06/10/22	06/20/22
August 2022	Weds. 06/29/22	07/05/22	07/08/22	07/20/22
September 2022	Weds. 08/10/22	08/16/22	08/19/22	08/20/22
October 2022	Weds. 09/07/22	09/13/22	09/16/22	09/20/22
November 2022	Weds. 10/05/22	10/11/22	10/14/22	10/20/22
December 2022	Weds. 11/02/22	11/08/22	11/11/22	11/20/22
January 2023	Weds. 11/30/22	12/06/22	12/09/22	12/20/22
February 2023	Weds. 01/11/23	01/17/23	01/20/23	01/20/23
March 2023	Weds. 02/08/23	02/14/23	02/17/23	02/20/23
April 2023	Weds. 03/08/23	03/14/23	03/17/23	03/20/23
May 2023	Weds. 04/05/23	04/11/23	04/14/23	04/20/23
June 2023	Weds. 05/03/23	05/09/23	05/12/23	05/20/23



# FY23 Parking Process Calendar

www.benstrat.com/clients/Commonwealth/

## 2023FY PARKING Election Change Process Calendar

The deadline to submit the July 2022 Election Change E-Form is June 15<sup>th</sup> for the PARKING benefit.



This benefit month will be processed via payroll on June 21<sup>st</sup> and will be reflected in the June 24<sup>th</sup> paycheck.

Funds will be pre-funded to the debit card on June 20<sup>th</sup> \*\*

\*\*The amount pre-funded each month is based on the previous month's benefit amount **IF** the processing date is later than the 20<sup>th</sup>\*\*

## PARKING ELECTION CHANGE PROCESS CALENDAR FY2023 07/01/22-06/30/23

Benefit Month	Requests Received by Benefit Strategies	Payroll Process Date	Payroll Check Date	Funds Credited To Debit Card
July 2022	Weds. 06/15/22	06/21/22	06/24/22*	06/20/22
August 2022	Weds. 07/13/22	07/19/22	07/22/22*	07/20/22
September 2022	Weds. 08/24/22	08/30/22	09/02/22	08/20/22
October 2022	Weds. 09/21/22	09/27/22	09/30/22*	09/20/22
November 2022	Weds. 10/19/22	10/25/22	10/28/22*	10/20/22
December 2022	Weds. 11/16/22	11/22/22	11/25/22*	11/20/22
January 2023	Weds. 12/14/22	12/20/22	12/23/22*	12/20/22
February 2023	Weds. 01/25/23	01/31/23	02/03/23	01/20/23
March 2023	Weds. 02/22/23	02/28/23	03/03/23*	02/20/23
April 2023	Weds. 03/22/23	03/28/23	03/31/23*	03/20/23
May 2023	Weds. 04/19/23	04/25/23	04/28/23*	04/20/23
June 2023	Weds. 05/17/23	05/23/23	05/26/23*	05/20/23



## Contact Information for Employees:

Mon → Thurs: 8:00am – 6:00pm ET

Friday: 8:00am – 5:00pm ET

*(Automated system available at all times)*

Text-To-Chat: 1-877-353-9442

Email: [Commonwealth@benstrat.com](mailto:Commonwealth@benstrat.com)

Toll Free: 1-877-353-9442

Language translation services available

Fax: 603-232-8079

## Contact Information for Coordinators:

Account Manager: Angela Thivierge

Email: [athivierge@benstrat.com](mailto:athivierge@benstrat.com)



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# Have Questions?

We've got you covered.

# Calendar Year End Prep

Tryntje Bumgardner

# Year End Preparation



- ★ Process anything that impacts wages in a timely manner
- ★ Verify entries are up-to-date
- ★ Specifically:
  - PRRVs
  - Tax Refunds/Adjustments
  - Pre-tax Deduction Refunds/Adjustments
  - Imputed Income (Parking/Housing)

# Employee Address Updates

- ★ The Home address in HR/CMS is where all year-end tax documents are mailed for employees who do not choose electronic delivery
- ★ Missing or incorrect data causes returned documents and requires increased support to provide replacement documents
- ★ Statewide Payroll team members will be emailing department core users regarding missing information, but department core users can monitor this information themselves using the CIW
- ★ HR/CMS is the source system for personnel information, it should not be populated with false or inaccurate data

# SQL Statement

```
SELECT dbo_wh_job.xref_empl_status, dbo_wh_job.department, dbo_wh_job.key2_emplid,
dbo_wh_employees.last_name, dbo_wh_employees.first_name,
dbo_ps_addresses.key3_xref_address_type, Max(dbo_ps_addresses.efdtd) AS MaxOfefdtd,
dbo_ps_addresses.address1, dbo_ps_addresses.address2, dbo_ps_addresses.address3,
dbo_ps_addresses.city, dbo_ps_addresses.state, dbo_ps_addresses.postal

FROM (dbo_wh_job INNER JOIN dbo_ps_addresses ON dbo_wh_job.key2_emplid =
dbo_ps_addresses.key2_emplid) INNER JOIN dbo_wh_employees ON dbo_wh_job.key2_emplid =
dbo_wh_employees.key2_emplid

GROUP BY dbo_wh_job.xref_empl_status, dbo_wh_job.department, dbo_wh_job.key2_emplid,
dbo_wh_employees.last_name, dbo_wh_employees.first_name,
dbo_ps_addresses.key3_xref_address_type, dbo_ps_addresses.address1,
dbo_ps_addresses.address2, dbo_ps_addresses.address3, dbo_ps_addresses.city,
dbo_ps_addresses.state, dbo_ps_addresses.postal

HAVING (((dbo_wh_job.xref_empl_status) In ("A","L","P","S"))) AND
((dbo_ps_addresses.key3_xref_address_type)="HOME"))

ORDER BY dbo_wh_job.department, dbo_wh_job.key2_emplid,
dbo_ps_addresses.key3_xref_address_type;
```

# Year End Tax Documents

- ★ **W-2 and 1095C mailings for 2021 cost the Commonwealth \$116,000**
- ★ **Equivalent to greenhouse gas emissions from 66,186 miles driven by an average vehicle**
- ★ **The amount of paper would use approximately 45 trees**





# Status Update W-2

## September 2021 Totals

Cabinet/Branch/Independent	# Of Employees
EXECUTIVE OFFICE OF ENVIRONMENTAL AFFAIRS	1,559
EXECUTIVE OFFICE FOR ADMINISTRATION & FINANCE	1,400
EXECUTIVE OFFICE OF ECONOMIC DEVELOPMENT	478
EXECUTIVE OFFICE OF EDUCATION	8,322
EXECUTIVE OFFICE OF HEALTH & HUMAN SERVICES	10,000
EXECUTIVE OFFICE of LABOR and WORKFORCE DEVELOPMENT	700
EXECUTIVE OFFICE OF PUBLIC SAFETY & HOMELAND SECURITY	3,723
EXECUTIVE OFFICE OF TECHNOLOGY SERVICES AND SECURITY	251
MASSACHUSETTS DEPARTMENT OF TRANSPORTATION	1,725
JUDICIARY	3,013
LEGISLATURE	14
SHERIFF DEPARTMENTS	1,652
Constitutional/ Independent Departments	4,524
<b>Total</b>	<b>37,361</b>
Percent Today	38%
Goal 70%	77,000

## September 2022 Totals

Cabinet/Branch/Independent	# Of Employees
EXECUTIVE OFFICE OF ENVIRONMENTAL AFFAIRS	1,852
EXECUTIVE OFFICE FOR ADMINISTRATION & FINANCE	1,572
EXECUTIVE OFFICE OF ECONOMIC DEVELOPMENT	536
EXECUTIVE OFFICE OF EDUCATION	10,430
EXECUTIVE OFFICE OF HEALTH & HUMAN SERVICES	12,521
EXECUTIVE OFFICE of LABOR and WORKFORCE DEVELOPMENT	875
EXECUTIVE OFFICE OF PUBLIC SAFETY & HOMELAND SECURITY	4,266
EXECUTIVE OFFICE OF TECHNOLOGY SERVICES AND SECURITY	282
MASSACHUSETTS DEPARTMENT OF TRANSPORTATION	4,699
JUDICIARY	4,005
LEGISLATURE	19
SHERIFF DEPARTMENTS	1,973
Constitutional/ Independent Departments	2,262
<b>Total</b>	<b>45,292</b>
Percent Today	42%
Goal 70%	77,000



# Status ACA

Cabinet/Branch/Independent	# of Employees
EXECUTIVE OFFICE OF ENVIRONMENTAL AFFAIRS	797
EXECUTIVE OFFICE FOR ADMINISTRATION & FINANCE	608
EXECUTIVE OFFICE OF ECONOMIC DEVELOPMENT	257
EXECUTIVE OFFICE OF EDUCATION	5,863
EXECUTIVE OFFICE OF HEALTH & HUMAN SERVICES	5,751
EXECUTIVE OFFICE of LABOR and WORKFORCE DEVELOPMENT	391
EXECUTIVE OFFICE OF PUBLIC SAFETY & HOMELAND SECURITY	1,590
EXECUTIVE OFFICE OF TECHNOLOGY SERVICES AND SECURITY	149
MASSACHUSETTS DEPARTMENT OF TRANSPORTATION	2,116
JUDICIARY	1,495
LEGISLATURE	3
GOVERNOR	8
SHERIFF DEPARTMENTS	626
Constitutional/ Independent Departments	1,116
<b>Total</b>	<b>20,770</b>
Percent Today	16%
Goal 70%	77,000

# Questions