

# HR/CMS User Group

September 13, 2023



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. Massachusetts State Retirement Board**

## **III. HR/Payroll Announcements**

## **IV. Empower Retirement - SMART Plan**

## **V. TASC**

## **VI. Metro Credit Union**

## **VII. Payroll Reminders**

## **VIII. VOYA**

## **IX. Calendar Year End Preparation**

# Opening Remarks

Comptroller William McNamara

# Massachusetts State Retirement Board

Drenna Barrett





# MSRB

## Massachusetts State Retirement Board

WORKING AFTER RETIREMENT



# WORKING AFTER RETIREMENT

## INTRODUCTION

### OVERVIEW

- MGL Ch. 32 contains several provisions that pertain to public retirees working after retirement
- By statute, retirees working for public bodies in Massachusetts are limited in two important ways:
  - The number of hours they may work; and
  - The amount they may earn in salary or pay
- Limited circumstances under which they can rejoin a retirement system





# WORKING AFTER RETIREMENT

## SECTION 91(b)



### Hour Limitation

No public retiree may work more than 1,200 hours for a governmental unit in a calendar year

### Limited Employment

Employment of any public sector retiree for a governmental unit is limited

### Compensation Limitation

The limit cannot exceed the difference between the regular compensation the retiree would be making if still working and their pension (plus \$15,000 after a calendar year has passed)

### Employment Limits

Such employment is limited by hours and compensation



# WORKING AFTER RETIREMENT

'PLUS \$15,000.00'



## Allowable Earnings

Current salary from position retired from minus annual retirement allowance, plus \$15,000.00



## One Calendar year

However, the additional \$15,000 will not be permitted until at least one calendar year following retirement

## *Example:*

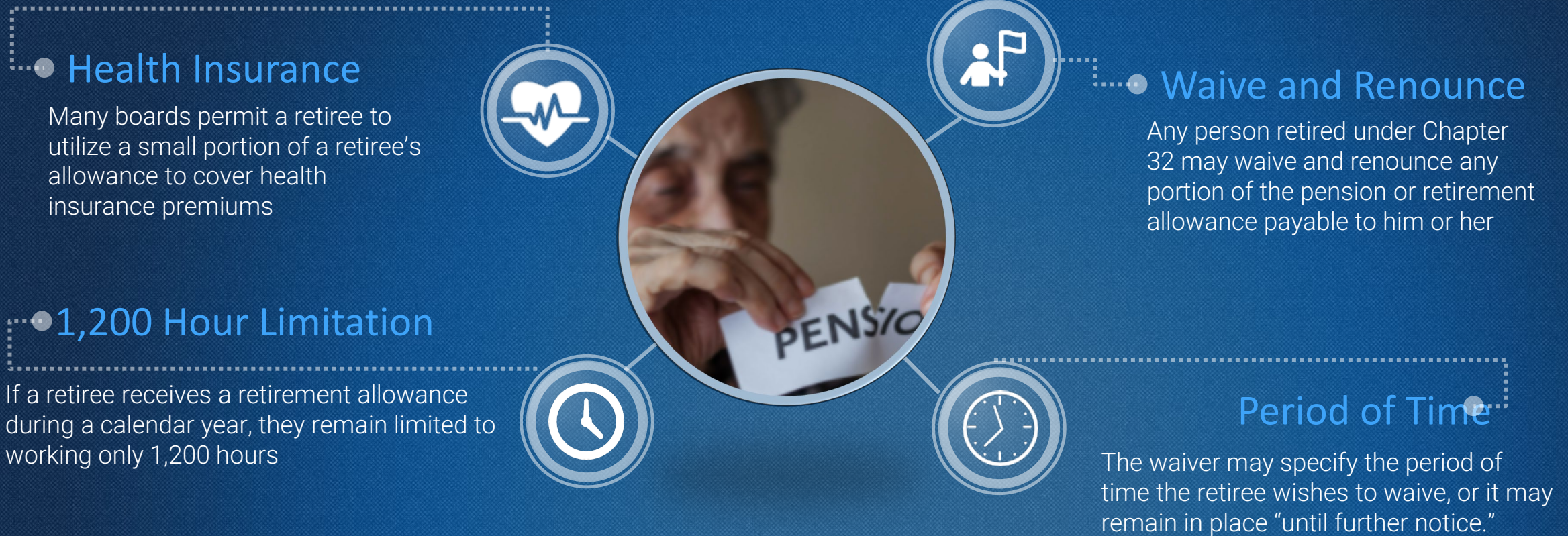
*Randall Stephens retired in June of 2020.*

*The additional \$15,000 is not permitted for him until January of 2022\*.*



# WORKING AFTER RETIREMENT

## SECTION 90B - WAIVER OF PENSION





# WORKING AFTER RETIREMENT

## SECTION 105

### Reinstatement



#### Eligibility

- Must have retired under superannuation/regular retirement or termination (S5 or S10)
- Submit application, (available on website)

#### Process

- Benefit admin team suspends the retiree's benefit as of the date noted on the application

#### Member must

- Pay back any prior benefit received plus buyback interest (to the board from which they retired)
- Agree to work 5 years (5 years of FT employment)
- Contribute at the rate that is currently in effect (reinstatement or date they waived benefit, whichever occurred earlier)

*\*When retired, combine both basics*



# HR/Payroll Announcements

Tryntje Bumgardner



# Wage Act & Final Paycheck for Terminated Employees

- ★ 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
- ★ HRD and CTR have been working with EOTSS to create a module within HR/CMS to generate final check for terminated employees
- ★ Functionality should be available by the end of September only to CTR Statewide Payroll Team



# 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 EOTSS ServiceNow to request assistance with calculating final paychecks prior to discharging employees





# ServiceNow Instructions

- ★ Logging into ServiceNow for the first time: Go to: <https://massgov.servicenow.com/sp/?id=login>
- ★ Click on 'Forgot Password'
- ★ Enter your primary work email address (@mass.gov, @massmail.state.ma.us, @state.ma.us, @dor.state.ma.us, etc.)
- ★ Verify the information is correct
- ★ Click 'Reset Password'
- ★ Your password will be emailed to you
- ★ Click the link in email, you will return to the ServiceNow Portal where you can enter your email address and new password to login
- ★ Upon login, you will be asked to set a new password
- ★ If this does not work for you and an account has not been set up for you and you should have one, send a request for an account to be set up with your agency Department Security Officer.
- ★ More information on ServiceNow - <https://www.mass.gov/servicenow>



# ServiceNow Instructions

- ★ All requests to HRD and CTR must be logged through ServiceNow
  - Track our work
  - Allows us to efficiently support departments
- ★ There are 2 instances of SNOW
  - EOTSS - All HR/CMS related issues
  - CTR - All LCM/MMARS related issues
- ★ Log your own tickets
  - Allows you to assign tickets directly to a team
  - Will allow tickets to get to the respective teams faster as tickets won't be triaged by EOTSS
- ★ Do not log tickets as incidents
  - Dead End
- ★ Ensure description and message are clear and include EMPL ID and record numbers
  - May avoid unnecessary follow up
  - Expedite resolution



# Questions



# SMART Plan

Karl Kroner



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# Commonwealth of Massachusetts SMART Plan Update



Payroll User Group Meeting  
September 13th, 2023



# SMART Plan Agenda

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- SECURE 2.0
  - Roth/Catch-up - DELAYED
- ROTH Contributions
- SMART Plan Overview
- Questions



# Secure 2.0: Roth/Catch-up provision

## Required implementation delayed until 2026

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### Catch-up contributions must be ROTH

For EE's that had incomes over \$145,000 in prior year

The Roth option reduces your take-home pay dollar for dollar and offers the following benefits:

1. It essentially locks in today's tax rates on all contributions.
2. For those who expect to be in a higher tax bracket when they retire, the Roth option allows you to pay taxes on your contributions when they are contributed (presumably at a lower tax rate than you would expect to pay at retirement).



# ROTH Option – Deferral File

GQ19OEDF xxxxx-01 Pl: Dept. of xxx & xxx		Commonwealth of Massachusetts Deferred Compensation Plan Employee Elected Deferrals					Run Date: 02/05/2023 Pay Date: 02/18/2023			
SSN	Name	Employee Number	Hire Date	Before Tax	50 Roth	Hardship End Date	Accelerated Code	Deferral End Date	Amount	Deferral Change Time Stamp
XXX-XX-XXXX	ADAMS, JIM	XXXXXX	10/27/2008	940.00\$	Y					01/22/2023
XXX-XX-XXXX	BAKER, SAMANTHA	XXXXXX	02/21/2006	175.00\$	Y		Catch-Up	12/31/2023	40,000\$	01/23/2023
XXX-XX-XXXX	DAVIS, JANE	XXXXXX	12/30/2013	50.00\$	N	100.00\$				01/28/2023
XXX-XX-XXXX	LOPEZ, JOSE	XXXXXX	02/16/2007	400.00\$	Y					01/31/2023
XXX-XX-XXXX	MASON, JOHN	XXXXXX	03/26/2013	50.00\$	N	50.00\$				01/29/2023
XXX-XX-XXXX	QUINN, SALLY	XXXXXX	01/04/1999	50.00\$	Y					01/16/2023

SAMPLE

# Plan Statistics (as of June 30, 2023)

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## Total SMART Plan

■ Total Plan assets	\$ 11.84 Billion
■ Roth Assets	\$250.33 Million
■ Total Participants	289,068
■ Q1 Contributions	\$128.43 Million

## OBRA Mandatory

■ Participants	170,606
■ Target Date Fund Assets	\$3.73 Million
■ Objective-Based Fund Assets	\$1.98 Million



# Retirement Plan Advisor

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- Retirement Readiness Reviews
- Allocation assistance
- Appointments can be scheduled on-line:
  - [www.mass-smart.com](http://www.mass-smart.com)
  - [SMART@Empower.com](mailto:SMART@Empower.com)

# Questions?

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[SMART@Empower.com](mailto:SMART@Empower.com)

Thank you



# Questions?

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Thank you

# TASC

Amanda Odom





Commonwealth of Massachusetts  
Group Insurance Commission

# HR/CMS User Group Meeting

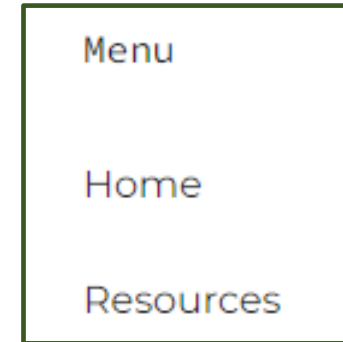
September 13, 2023



# HCSA/DCA CHANGE FORM

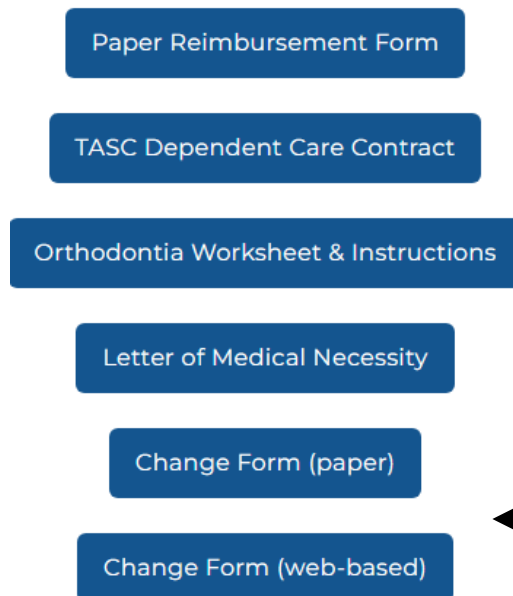
Web-Based and Paper Versions located on [massfsatasc.com](https://massfsatasc.com)

Click on 'Resources' link at bottom of page

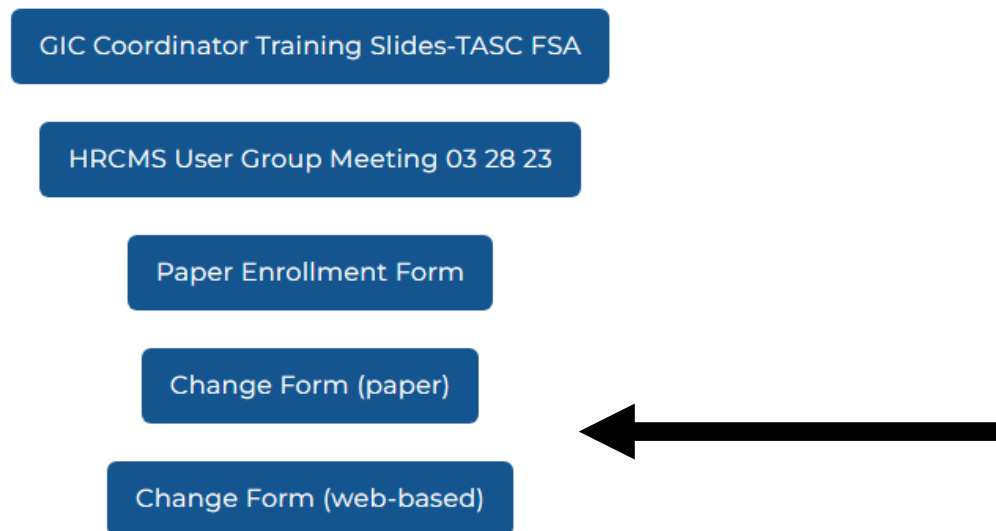


## Participant Resources – Forms

### Forms



## GIC Coordinator Resources





# **Change form to be used for the following events:**

1. Qualifying Event Resulting in Add or Change of Coverage\*
2. Leave of Absence (LOA)
3. Reclassification
4. Payroll Refund Request
5. Termination of Employment (submitted by GIC Coordinator)

\* Enrollment form MUST also be completed/submitted if an employee is adding coverage due to a qualifying life event and documentation MUST be provided for all status changes

# Change of Status

## 1. Qualifying Event Resulting in Add or Change of Coverage

**(NOTE: Enrollment form *MUST* also be completed/submitted if adding coverage due to a qualifying life event)**

**Can be submitted by Employee or GIC Coordinator**

**Form must be submitted within 60 days of the date of the qualifying event**

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Status changes in this section can be submitted by Employee – or - GIC Coordinator

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**ELECTION CHANGE** – Currently enrolled employees who have had a qualifying event and wish to adjust their account may do so by completing this information and submitting this form within 60 days of the event date of the status change listed below. Changing the FSA does not allow a refund of your already contributed funds, which can include deductions taken while your request is processed and approved. NOTE: approved changes to elections will be effective the first of the month after the request is approved.

Supporting documentation MUST be provided to substantiate your change in status. Submit the supporting documentation along with this form. Acceptable documentation is listed below next to each change of status event type.

If you have a qualifying event and wish to enroll in an FSA for the first time, please **indicate your qualifying event and new election amount below and then complete the enrollment form. Both forms must be submitted together.** Please note: For Dependent Care Assistance Program (DCAP), there is a limit of \$192.30 per bi-weekly pay period. Please calculate your elections accordingly.

- ☐ 1. Qualifying Event Resulting in Drop of Coverage or Change in Coverage
- ☐ Reduce my election amount based on my qualifying event below.
  - ☐ Increase my election based on my qualifying event below.
  - ☐ Make a new election based on my qualifying event below. **NOTE:** Must also complete and submit the enrollment form if making a new election due to a qualifying event.

Date of Event: \_\_\_\_\_

New Election Amount: **NOTE:** Decreases in annual election may be no less than the greater of the amount that has been contributed or disbursed through payroll deduction as of the date this request is approved.

HCSA: \_\_\_\_\_ DCAP: \_\_\_\_\_



# 1. Qualifying Event Resulting in Add or Change of Coverage (cont.)

- Change in Status Types and Approved Supporting Documentation
- GIC Coordinator Approval Required

**Can be submitted by Employee or GIC Coordinator**

CHANGE IN STATUS TYPE:	APPROVED SUPPORTING DOCUMENTATION:
<input type="checkbox"/> Became eligible for Medicare or Medicaid	Medicare or Medicaid eligibility letter
<input type="checkbox"/> Loss of Medicare or Medicaid coverage eligibility	Medicare or Medicaid Loss of Coverage Letter
<input type="checkbox"/> Marriage	Marriage Certificate
<input type="checkbox"/> Divorce / Annulment	Divorce or Annulment Decree
<input type="checkbox"/> Judgment, decree or court order	The judgment, decree, or court order
<input type="checkbox"/> Birth, adoption, or placement of a child	-Birth Certificate -Certification of Adoption -Foster care certification
<input type="checkbox"/> Death of a spouse or dependent	Death Certificate
<input type="checkbox"/> Change in spouse's employment status	Documentation showing spouse's termination or commencement of employment, change of status from employee to independent contractor, change in hours, strike or lockout, a commencement or return from an unpaid leave of absence, or a change in work site
<input type="checkbox"/> Change in employee's benefits status	Documentation showing reduction in hours resulting in no longer qualifying for benefits or increase in hours which result in qualifying for benefits
<input type="checkbox"/> Dependent no longer a qualified tax dependent	Documentation showing dependent is no longer under age 19 or under age 26 and a full-time student, or is no longer living in your home half of the tax year and you are no longer providing more than half of their support in a tax year. There is no age limit for permanently disabled dependents.
<input type="checkbox"/> Beginning LOA	Completion of Section 2. of the HCSA/DCA Change Form
<input type="checkbox"/> Ending LOA	Completion of Section 2. of the HCSA/DCA Change Form
<input type="checkbox"/> (DCAP Only) Child turned age 13	Child's birth certificate
<input type="checkbox"/> (DCAP Only) Change in cost of care	Copies of invoices showing change in cost of care, or signed letter from daycare provider
<input type="checkbox"/> (DCAP Only) Change of daycare provider	Copies of invoices showing change in daycare provider, or signed letter from daycare provider
<input type="checkbox"/> Termination / Leaving State Service*	Completion of Section 5. Of the HCSA/DCA Change Form (either on this form or a separate change form)

*\*Select this option if you are reporting the end of state employment – in advance (Employees Only)*

GIC Coordinator Approval of Change in Status / Documentation is REQUIRED. GIC Coordinators, please sign here:

Signature: \_\_\_\_\_

# Leave of Absence (LOA)

## 2. Leave of Absence (LOA) (Notification of Beginning and/or Ending)

**NOTE: *Prepay or Direct Bill options are not allowed if completion/submission of this form is NOT done prior to the beginning of LOA***

**Can be submitted by Employee or GIC  
Coordinator**

☐ 2. Leave of Absence (LOA) **NOTE:** You must report the start – and end – for LOA. If you do not know the end date when you are notifying the beginning of a LOA, complete and submit this form again at the end of your LOA indicating the ending date.

☐ Notification of Beginning LOA Date:  
LOA Start Date: \_\_\_\_\_

☐ Notification of Ending LOA Date:  
LOA End Date: \_\_\_\_\_

If selecting Prepay or Direct Bill – completion/submission of this form **MUST** be prior to beginning LOA

Is employee enrolled in a HCSA account?  
☐ Yes ☐ No

Type of LOA FOR HCSA account:

☐ Paid (deductions will continue to be taken from the employee's pay each pay period and the HCSA coverage will continue uninterrupted. Expenses can be incurred before, during, and after the LOA. *(If an employee changes to an unpaid status, GIC Coordinators are responsible for notifying TASC of any changes during the LOA on behalf of the employee)*

☐ Unpaid (Prepay, Direct Pay, Pay upon Return or No Coverage with Adjusted Election)

Indicate type for unpaid LOA from listing above *(Prepay and Direct Pay Options are only available if requested in advance of the start of LOA)*: \_\_\_\_\_

**Direct Pay:** Employees have the option to be directly billed for premiums and administration fees while on LOA. Direct Pay deductions will be post-tax, as they are not occurring through payroll. TASC will invoice the employee once a month, at the beginning of the month, with the amount due. The employee must pay the premium no later than the first pay date of the month on which the employee would have received a paycheck had they been active. Payments must be made in a timely manner for the HCSA debit card and account to remain active. **There is no grace period for a missed direct payment. If payment is not paid by the due date, then coverage is discontinued until the employee's return to active status.** GIC Coordinators: Only choose this option if the employee has requested this.



# Reclassification/Payroll Refund Requests

## 3. Reclassification

Requests in this section can be submitted by Employee – or - GIC Coordinator  
and must be approved by GIC. Supporting information must be included below or documentation attached to  
support the request

☐ 3. Reclassification:

Previous GIC Agency Type: <sup>3</sup>	
Previous GIC Division Code: <sup>3</sup>	
Date of Change:	
Reason for Reclassification:	

<sup>3</sup>See GIC Agency Listing at [massfsatasc.com](http://massfsatasc.com)

## 4. Payroll Refund Requests

☐ 4. Payroll Refund Required: (request must be made within 60 calendar days of Payroll Error)

Payroll Date of Error:							
Deduction Code(s): (select all that apply)		<input type="checkbox"/> HCSA		<input type="checkbox"/> DCAP		<input type="checkbox"/> HCSAF	
HCSA Error Amount:		DCAP Error Amount:		HCSAF Error Amount:			
Plan year payroll error occurred:							
Reason for Refund Request:							

Can be submitted by Employee or GIC Coordinator

# Termination of Employment (Submitted by GIC Coordinator)

## 5. Termination of Employment (submitted by GIC Coordinator)

**Submitted by GIC Coordinator – if Employee did not Submit prior to leaving State employment**

☐ 5. Termination of Employment:

Date State Employment Ended:	
Enter last payroll date with deduction for HCSA or enter N/A if employee was not enrolled:	
Enter last payroll date with deduction for DCAP or enter N/A if employee was not enrolled:	

☐ Acknowledgement by GIC Coordinator for Termination of Employment

By completing this form and checking this box and the box below, I confirm the following:

I am the named agency's GIC Coordinator and in this role I have regular knowledge of employment start dates and end dates. I confirm that the employee named on this form is **no** longer employed by this agency, as of the date indicated. I confirm that the employee listed on the form was enrolled in at least one FSA plan and that the employee was provided the following information, either just prior to or subsequent to ending employment with the agency:

- Information about using remaining money in the FSA(s) that they were enrolled in
- Information directing the employee to submit an online status change form
- Information directing the employee to TASC if they have additional questions about their unused FSA(s) funds

# Processes for Change of Status Form

## 1. Qualifying Event Resulting in Add or Change of Coverage

If Form is submitted to TASC by Employee with approved supporting documentation:	TASC will send copies of documents to GIC Coordinator requesting them to approve/sign and return to TASC
If Form is submitted to TASC by Employee without approved supporting documentation:	TASC will send copy of change form to GIC Coordinator and request that the GIC Coordinator obtain the approved supporting documentation. GIC Coordinator will send the approved/signed change form, along with the approved supporting documentation back to TASC
If approved/signed Form is submitted to TASC by GIC Coordinator with approved supporting documentation:	TASC will process the change
If Form is submitted to TASC by GIC Coordinator and is not approved/signed and/or does not have the approved supporting documentation:	TASC will return the form to GIC Coordinator and request that the GIC Coordinator obtain the approved supporting documentation and return that to TASC along with the approved/signed change form



# Processes for Leave of Absence (LOA)

## 2. Leave of Absence (LOA)

If Form is submitted to TASC by Employee:	TASC will process the change and send copy to GIC Coordinator
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If Form is submitted to TASC by GIC Coordinator:	TASC will process the change
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**NOTE:** Acknowledgement MUST be made if GIC Coordinator is submitting the form for LOA on behalf of the employee

### ☐ Acknowledgement by GIC Coordinator for LOA if completing form on behalf of the employee:

By completing this form on behalf of the employee, I confirm the following:

I am the named agency's GIC Coordinator and in this role I have regular knowledge of LOA start dates and end dates. I confirm that the employee named on this form or an eligible dependent of the employee named on this form, has had a qualifying change in status, as defined by the Internal Revenue Service, which allows the employee to change their previous Health Care Spending Account (HCSA) and/or Dependent Care Assistance Program (DCAP) election. I understand that this change in election must be consistent with and correspond to the event. I understand that by requesting to change the employee's elections, that they are not entitled to a refund of their already contributed deductions, which may include those deductions taken when the request is being processed and approved.

This form cancels and prior elections the employee has made under this plan and cannot be changed except as stated in the GIC Participant Handbook for the current plan year.

By checking the box, I acknowledge that:

1. I have reviewed the terms and above and accept the terms
2. I acknowledge that I have read the GIC Participant Handbook and must abide by and follow all plan rules
3. I confirm the employee listed on this form has agreed to all information submitted on their behalf and was provided the following information, either just prior to or subsequent to starting or ending the reported LOA:
  - Information on each LOA option as per the GIC Participant Handbook
  - Information directing the employee to TASC if they have additional questions about their FSA(s)

# Processes for Reclassification & Payroll Refund Requests

## 3. & 4. Reclassification & Payroll Refund Requests

- TASC will collect these type of requests and send on a bi-weekly basis to:  
Cameron McBean ([Cameron.mcbean@state.ma.us](mailto:Cameron.mcbean@state.ma.us))  
If Cameron is out of office (receipt of an out of office reply) –the request will be sent to  
Jannine Dewar ([jannine.dewar@state.ma.us](mailto:jannine.dewar@state.ma.us))
- Cameron (or Jannine) will approve or deny the request and send back to TASC Commonwealth email
- TASC will forward their approval or denial to the GIC Coordinator
- GIC Coordinator is then responsible for notifying the employee/participant, refunding payroll deductions as applicable and updating MAGIC as applicable

### If Requests are Approved by GIC:

TASC will move participants appropriately in the system for Reclassifications

TASC will manage any funding adjustments appropriately in the system for Payroll Refunds

# Processes for Terminations submitted by GIC Coordinator

## 5. Termination of Employment (submitted by GIC Coordinator):

- TASC will process the termination

**NOTE:** Completion of the Change Form for terminations will assist in reconciling payroll file discrepancies

All form submissions, whether via the website or via paper form MUST be dated and have the acknowledgement checked and Name of Person Completing the Form

☐ I acknowledge that by checking this box that all information provided on this form and all documentation attached is true and accurate to the best of my knowledge.

Print Name of Person Completing Form: \_\_\_\_\_

Signature of Person Completing Form: \_\_\_\_\_

Date: \_\_\_\_\_



# TASC Processes for New Hire Enrollments and Enrollments Due to a Qualifying Life Event

- **New Hire Enrollments**

- TASC will pull enrollments from [massfsatasc.com](https://massfsatasc.com) every week on Monday
- TASC will process the enrollments
- Enrollments will be sent to the GIC Coordinator
- GIC Coordinator to advise TASC via [CommonwealthofMA@tasconline.com](mailto:CommonwealthofMA@tasconline.com) email inbox if any discrepancies found
- GIC Coordinator to enter elections/deductions into payroll system – including the \$1.00/PEPM Admin Fee deduction
- GIC Coordinator to ensure that 1<sup>st</sup> payroll deduction is taken from employee's checks (based on eligibility start date)

- **Enrollments due to a Qualifying Life Event**

- TASC will check for change forms on a daily basis and process as described in the previous slides
- If employee is adding coverage due to a qualifying life event, TASC will look for a completed/submitted enrollment form also and marry these two documents together and send to the GIC Coordinator (separate from the enrollment file for new hires)
  - If no enrollment form was submitted, TASC will reach out to the employee and ask them to also complete the enrollment form

# TASC CONTACT INFORMATION

- **GIC Coordinators**

- All communications to TASC from GIC Coordinators should be via the [CommonwealthofMA@tasconline.com](mailto:CommonwealthofMA@tasconline.com) email inbox. This email inbox should not be shared with employees

- **Employee Participating in Benefits**

- Employees should contact TASC via the dedicated Customer Care Phone #, which is also located on the back of their TASC card:

**800-745-9202**

**Monday – Friday: 8:00am to 5:00pm, all time zones**

**Saturday: 8:00am to 12:00pm, Eastern Time**



Questions?



# Metro Credit Union

Brandon Williams



**METRO**  
CREDIT UNION



**September 2023 Updates**



# Education Loans

- Undergrad & Grad School
  - More than 3,000 Schools
- Great offset to Federal Aid
- Refinancing Options Available







# Metro Connect

- Open new accounts
- Make a withdrawal via official check
- Add a joint holder to the account
- Make a payment to a Metro loan from a Metro account
- And more!



SCAN HERE  
TO ENTER  
OUR RAFFLE!



# Seminar Series

- Condensed Format
- Same Great Information
- Topics Catered to You
  - Personal Finance
  - Credit
  - Family Finances
  - Home Ownership
  - Identity Theft & Fraud
  - And More!



David Fielding, Financial Wellness Educator, presents to a group at the Chelsea Chamber of Commerce



# Coming Soon!

## Massachusetts State Employees HR/CMS Pay Calendar 2023

JANUARY							FEBRUARY							MARCH						
SUN	MON	TUES	WED	THURS	FRI	SAT	SUN	MON	TUES	WED	THURS	FRI	SAT	SUN	MON	TUES	WED	THURS	FRI	SAT
1	2	3	4	5	6	7	1	2	3	4	5	6	7	1	2	3	4	5	6	7
8	9	10	11	12	13	14	8	9	10	11	12	13	14	8	9	10	11	12	13	14
15	16	17	18	19	20	21	15	16	17	18	19	20	21	15	16	17	18	19	20	21
22	23	24	25	26	27	28	22	23	24	25	26	27	28	22	23	24	25	26	27	28
29	30	31					29	30	31					29	30	31				

APRIL							MAY							JUNE						
SUN	MON	TUES	WED	THURS	FRI	SAT	SUN	MON	TUES	WED	THURS	FRI	SAT	SUN	MON	TUES	WED	THURS	FRI	SAT
						1	1	2	3	4	5	6	7					1	2	3
2	3	4	5	6	7	8	8	9	10	11	12	13	14	4	5	6	7	8	9	10
9	10	11	12	13	14	15	15	16	17	18	19	20	21	11	12	13	14	15	16	17
16	17	18	19	20	21	22	22	23	24	25	26	27	28	18	19	20	21	22	23	24
23	24	25	26	27	28	29	29	30	31					25	26	27	28	29	30	

JULY							AUGUST							SEPTEMBER						
SUN	MON	TUES	WED	THURS	FRI	SAT	SUN	MON	TUES	WED	THURS	FRI	SAT	SUN	MON	TUES	WED	THURS	FRI	SAT
						1														
2	3	4	5	6	7	8	6	7	8	9	10	11	12	3	4	5	6	7	8	9
9	10	11	12	13	14	15	13	14	15	16	17	18	19	10	11	12	13	14	15	16
16	17	18	19	20	21	22	20	21	22	23	24	25	26	17	18	19	20	21	22	23
23	24	25	26	27	28	29	27	28	29	30	31			24	25	26	27	28	29	30

OCTOBER							NOVEMBER							DECEMBER						
SUN	MON	TUES	WED	THURS	FRI	SAT	SUN	MON	TUES	WED	THURS	FRI	SAT	SUN	MON	TUES	WED	THURS	FRI	SAT
1	2	3	4	5	6	7														
8	9	10	11	12	13	14	5	6	7	8	9	10	11	3	4	5	6	7	8	9
15	16	17	18	19	20	21	12	13	14	15	16	17	18	10	11	12	13	14	15	16
22	23	24	25	26	27	28	19	20	21	22	23	24	25	17	18	19	20	21	22	23
29	30	31					26	27	28	29	30			24	25	26	27	28	29	30

- Currently in Development
- Emails will be coming early November





## Dedicated Contact



Brandon Williams, CCUFC  
Metro@Work Relationship Manager  
[BWilliams@MetroCU.org](mailto:BWilliams@MetroCU.org)  
877.MY.METRO ext. 5408

### Upcoming Site Visits

MITC Building: 9/21 – 11:30am to 1:30pm

Ashburton Place: 10/10 – 11:30am to 1:30pm

# Payroll Reminders

Eduardo Canton

# 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)



# Correction Mode in HR/CMS

- ★ Correction mode will only be used to make changes when an employee's pay, creditable service or GLC 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
- ★ Please log a ticket in ServiceNow if you need help

# Mid Pay Period Schedule Changes

- ★ Always use the first Sunday of the following pay period
- ★ In the Timesheet, manually enter/adjust the hours of the current pay period
- ★ Under no circumstances should a work schedule have a mid-week effective date

# HEDID Mass Contractor Termination

- ★ All active HEDID contractors hired or rehired before 10/1/2022, who have not been paid since 10/1/2022, will be mass terminated on 10/27/2023 with the effective date of 10/21/2023.
- ★ CTR will contact the affected departments and provide them with the list of contractors scheduled for the mass termination. The departments will need to review the list and respond to CTR by 10/20/2023 approving or requesting that some of their contractors be excluded from the mass termination process



# HIRE vs. REHIRE

- ★ Please do not use “HIR” (Hire) for the Action when rehiring the existing employee terminated job record. The terminated employee should be rehired considering that the employee was already hired once back in history.
- ★ If “HIRE” is processed instead of “REHIRE” it may cause error messages when updating some of the HRCMS pages with existing history and effective dates prior to the second “HIRE” transaction effective date in Job Data

# Questions

# Benefit Strategies

Angela Thivierge



# Payroll User Group Meeting

Wednesday September 13<sup>th</sup> 2023



Information contained herein is proprietary, confidential and non-public and is not for public release.

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# Agenda

- Commuter Choice Parking and Transit Overview

# Commonwealth Commuter Programs

## 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

Need Help with Commuter forms or Questions? Email:  
[Angela.Thivierge@voya.com](mailto:Angela.Thivierge@voya.com)

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

# Commuter Election Form

- 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)

Need Help with Commuter forms or Questions? Email:  
[Angela.Thivierge@voyafinancial.com](mailto:Angela.Thivierge@voyafinancial.com)



# Transit Process Calendar

## TRANSIT ELECTION CHANGE PROCESS CALENDAR FY2024 07/01/23-06/30/24

Benefit Month	Requests Received by Benefit Strategies	Payroll Process Date	Paycheck Date	Funds Credited To Debit Card
July 2023	Weds. 05/31/23	06/06/23	06/09/23	06/20/23
August 2023	Weds. 06/28/23	07/04/23	07/07/23	07/20/23
September 2023	Weds. 08/09/23	08/15/23	08/18/23	08/20/23
October 2023	Weds. 09/06/23	09/12/23	09/15/23	09/20/23
November 2023	Weds. 10/04/23	10/10/23	10/13/23	10/20/23
December 2023	Weds. 11/01/23	11/07/23	11/10/23	11/20/23
January 2024	Weds. 11/29/23	12/05/23	12/08/23	12/20/23
February 2024	Weds. 01/10/24	01/16/24	01/19/24	01/20/24
March 2024	Weds. 02/07/24	02/13/24	02/16/24	02/20/24
April 2024	Weds. 03/06/24	03/12/24	03/15/24	03/20/24
May 2024	Weds. 04/03/24	04/09/24	04/12/24	04/20/24
June 2024	Weds. 05/01/24	05/07/24	05/10/24	05/20/24

# Parking Process Calendar

**PARKING** ELECTION CHANGE PROCESS CALENDAR  
FY2024  
07/01/23-06/30/24

Benefit Month	Requests Received by Benefit Strategies	Payroll Process Date	Payroll Check Date	Funds Credited To Debit Card
July 2023	Weds. 06/14/23	06/20/23	06/23/23*	06/20/23
August 2023	Weds. 07/12/23	07/18/23	07/21/23*	07/20/23
September 2023	Weds. 08/23/23	08/29/23	09/01/23*	08/20/23
October 2023	Weds. 09/20/23	09/26/23	09/29/23*	09/20/23
November 2023	Weds. 10/18/23	10/24/23	10/27/23*	10/20/23
December 2023	Weds. 11/15/23	11/21/23	11/24/23*	11/20/23
January 2024	Weds. 12/13/23	12/19/23	12/22/23*	12/20/23
February 2024	Weds. 01/24/24	01/30/24	02/02/24*	01/20/24
March 2024	Weds. 02/21/24	02/27/24	03/01/24*	02/20/24
April 2024	Weds. 03/20/24	03/26/24	03/29/24*	03/20/24
May 2024	Weds. 04/17/24	04/23/24	04/26/24*	04/20/24
June 2024	Weds. 05/15/24	05/21/24	05/24/24*	05/20/24

# Commuter Reminders and Examples

**\*\*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>\*\***

## Examples

The deadline to submit the July 2023 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.

The deadline to submit the July 2023 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> \*\*

Need Help with Commuter forms or Questions? Email:

[Angela.Thivierge@voyafinancial.com](mailto:Angela.Thivierge@voyafinancial.com)

# Have Questions?

## 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@voyafinancial.com](mailto:commonwealth@voyafinancial.com)

Toll Free: 1-877-353-9442

Language translation services available

Fax: 603-232-8079

## Contact Information for Coordinators:

Account Manager: Angela Thivierge

## Coordinator Contact ONLY:

Please do not refer a member to this email address:

[Angela.Thivierge@Voya.com](mailto:Angela.Thivierge@Voya.com)

My phone number will be made available from my email, and I am always happy to set up a call to answer any questions you may have about forms and resources!



# Calendar Year End Prep

Tryntje Bumgardner

# Year End Preparation



Photo by Scopio from Noun Project

- ★ 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 (Warehouse)
- ★ 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. effdt) AS MaxOfeffdt,
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

- ★ Form W-2 and 1095-C mailings for 2022 cost the Commonwealth \$120,000
- ★ Equivalent to greenhouse gas emissions from 684,000 miles driven by an average vehicle
- ★ The amount of paper would use approximately 47 trees



# Electronic Delivery of Tax Documents



- ★ Your support in campaigning employees to suppress these mailings is greatly appreciated
- ★ Electronic W-2s are delivered **early** and **securely**, directly in HR/CMS
- ★ Copy and paste information from PDF into tax preparation software
- ★ No risk of losing the W-2 in the mail or in your junk drawer!

# Status Update W-2

## 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

## September 2023 Totals

Cabinet/Branch/Independent	# Of Employees
EXECUTIVE OFFICE OF ENVIRONMENTAL AFFAIRS	1,964
EXECUTIVE OFFICE FOR ADMINISTRATION & FINANCE	1,667
EXECUTIVE OFFICE OF ECONOMIC DEVELOPMENT	366
EXECUTIVE OFFICE OF EDUCATION	19,589
EXECUTIVE OFFICE OF HEALTH & HUMAN SERVICES	12,970
EXECUTIVE OFFICE of LABOR and WORKFORCE DEVELOPMENT	790
EXECUTIVE OFFICE OF PUBLIC SAFETY & HOMELAND SECURITY	5,097
EXECUTIVE OFFICE OF TECHNOLOGY SERVICES AND SECURITY	276
MASSACHUSETTS DEPARTMENT OF TRANSPORTATION	5,387
JUDICIARY	4,343
LEGISLATURE	30
SHERIFF DEPARTMENTS	2,227
Constitutional/ Independent Departments	2,667
<b>Total</b>	<b>58,937</b>
Percent Today	46%
Goal 70%	88,547

# Status ACA

Cabinet/Branch/Independent	# of Employees
EXECUTIVE OFFICE OF ENVIRONMENTAL AFFAIRS	1,137
EXECUTIVE OFFICE FOR ADMINISTRATION & FINANCE	846
EXECUTIVE OFFICE OF ECONOMIC DEVELOPMENT	210
EXECUTIVE OFFICE OF EDUCATION	8,287
EXECUTIVE OFFICE OF HEALTH & HUMAN SERVICES	7,496
EXECUTIVE OFFICE of LABOR and WORKFORCE DEVELOPMENT	408
EXECUTIVE OFFICE OF PUBLIC SAFETY & HOMELAND SECURITY	2,111
EXECUTIVE OFFICE OF TECHNOLOGY SERVICES AND SECURITY	185
MASSACHUSETTS DEPARTMENT OF TRANSPORTATION	2,846
JUDICIARY	1,912
LEGISLATURE	9
GOVERNOR	26
SHERIFF DEPARTMENTS	880
Constitutional/ Independent Departments	1,614
<b>Total</b>	<b>27,967</b>
Percent Today	18%
Goal 70%	104,126



# Questions