

HR/CMS User Group

December 6, 2023



OFFICE OF THE COMPTROLLER
COMMONWEALTH OF MASSACHUSETTS



CHOCOLATE CHIP | OFFICIAL STATE COOKIE

Welcome

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

Agenda

I. Welcome

Remarks – William McNamara, Comptroller

II. COLAs & Retro Payments

III. Empower Retirement - SMART Plan

IV. Year End Processing, Form W-2 Distribution & ACA

V. VOYA – Qualified Transportation

VI. Public Records Exemptions Alerts

VII. Metro Credit Union

VIII. PFML Top Off

IX. Total Administrative Services Corporation (TASC) - FSAs

X. Payroll Reminders

Opening Remarks

Comptroller William McNamara

COLAs & Retro Payments

Eduardo Canton

COLAs & Retro Payments

- ★ Governor Healey signed supplemental budget with the reserve of collective bargaining agreement increases included
- ★ Both COLAs & Retro Payments will be processed on pay period end date 12/16/2023 with a check date of 12/22/2023

Detailed Timeline

Detailed Timeline

						7 THURSDAY	8 FRIDAY	9 SATURDAY
						7:00am COLA Predictive available 12:00pm Retro Standard Pay available	12:00pm Retro Special Predictive available 6:00pm COLA Production Insert	12:00pm Retro Special Predictive available
10 SUNDAY	11 MONDAY	12 TUESDAY	13 WEDNESDAY	14 THURSDAY	15 FRIDAY	16 SATURDAY		
12:00pm Retro Special Predictive available	12:00pm Signoff Retro Standard Pay 6:00pm Retro Production Insert							

COLA & Retro Payments Reports

★ COLA & Retro Payments reports will be available on MobiusView, CIW, and the U.S. Payroll WorkCenter within HR/CMS

★ MobiusView Reports

- HMCMP03B and HMCMP05B-COLA
- HMCMP07B and HMCMP08B-Retros

★ CIW Tables

- dbo_ps_ma_mcmp003b_rpt-COLA
- dbo_ps_ma_mcmp005b_rpt-COLA
- dbo_ps_ma_mcmp007b_rpt-Retro
- dbo_ps_ma_mcmp008b_rpt-Retro

★ U.S Payroll WorkCenter

- Menu > Payroll for North America > U.S. Payroll WorkCenter > Queries > Data Reports
- COLA Reports: 3B Salary Increase/Salary Plan & 5B Salary Increase/Salary Plan
- Retro Reports: 7B Addl Pay Retro/Base Pay Adjustment & 8B Addl Pay Retro Multi Pay Periods



Questions

SMART Plan

Karl Kroner

Commonwealth of Massachusetts SMART Plan Update



HR/CMS User Group Meeting
December 6th, 2023



SMART Plan Agenda

- New Limits for 2024
- Plan Service Center Authorization
- Special Catch-up
- Termed participants

2024 Contribution Limits – 457(b) plans

- Elective deferrals \$23,000 (\$22,500 in 2023)
- Special catch-up \$46,000 (\$45,000 in 2023)
- Age 50+ catch-up \$ 7,500 (same as 2023)

Plan Service Center (PSC)

- If contact person leaving, notify supervisor that replacement will need to set up access
- Critical to have someone able to access deferral files

Special Catch-up

- Note: Cannot be in special catch-up if over age 70 ½ (as stated in plan document)
- Look for indicator on file for approval
- Ppt must have worksheet completed

Commonwealth of Massachusetts Deferred Compensation Plan Run Date: 02/05/2023
Employee Elected Deferrals Pay Date: 02/18/2023

3	4	5	6	7	8	9	10	11
Hire Date	Before Tax	50 +	Roth	Hardship End Date	Accelerated Code	Deferral End Date	Amount	Deferral Change Time Stamp
10/27/2008	940.00\$	Y						01/22/2023
02/21/2006	175.00\$	Y						01/23/2023
12/30/2013	50.00\$	N	100.00\$		Catch-Up	12/31/2023	40,000\$	01/28/2023
02/16/2007	400.00\$	Y						01/31/2023
03/26/2013	50.00\$	N	50.00\$					01/29/2023
01/04/1999	50.00\$	Y						01/16/2023

SAMPLE

Termination Dates

- Returning employees who had previous term dates:
 - If employee is not over age 59 ½, cannot take a distribution if a term date not on the system
 - Make sure no term date on entire system from any employer
 - Example: Employee left service, came back 30 days later; re-established hire date, removed term date. Employee requested rollover to IRA; transaction denied

Questions?



SMART@Empower.com

Thank you

Year End Processing

Eduardo Canton

W-2 and 1095-C Distribution

★ Paper Delivery

- Update “Home Address” by January 1
- Mailed to employee’s Home Address
- Forms W-2 postmarked by January 31
- Avoid using PO Box as “Home Address”

★ Returns

- Undeliverable forms are returned to CTR and shredded

★ Reprints

- Use HR/CMS Employee Self-Service
- Contact Department for Forms W-2 prior to 2010

Go Paperless

- ★ **All employees are encouraged to Go Paperless!**
- ★ **Electronic delivery of Forms W-2 and 1095-C provides early access to forms**
(Helpful for students/parents applying for Financial Aid or for anyone to get your refund faster)
- ★ **Access is secure within HR/CMS Employee Self-Service**
- ★ **Lost, stolen, delayed, or misplaced paper forms expose PII (Personally Identifiable Information) to possible fraud**
- ★ **Electronic form allows you to cut and paste values into online tax prep software**

Preparation for Tax Year End



- ★ Pay Period Ending 12/16/2023 is the last pay period for 2023 W-2 reporting
- ★ Last Pay Period to correct Non-Cash Taxable Benefits:
 - CAR
 - PKF
- ★ All Taxes including Medicare and PFML

Employer Provided Vehicle

- ★ Fringe Benefits must be added to an employee's federal and state taxable gross income and are subject to federal and state income tax withholding and Medicare taxes
- ★ Includes an employee's use of an employer provided vehicle for business purposes which is also used for personal commuting
- ★ Accomplished through a non-cash "payment" included in Paycheck
- ★ Period is November 1, 2022 to October 31, 2023
- ★ \$1.50 per one way commute – or amount submitted by employee on OSD form
- ★ If not already entered, must be entered by **December 16, 2023**

Refund Processing Timelines

- ★ Receipt vouchers for pay period ending 12/2/2023 or earlier should be submitted to the State Retirement Board by COB December 9
- ★ Receipt vouchers for pay period ending 12/16/2023 must be submitted to the State Retirement Board by COB December 27
- ★ All “Deferrals-in-Error” or “Over Contributions” need to be refunded to the employee (cash in hand) prior to December 31 in order to have the W-2 updated correctly
- ★ Refund requests go to Treasury c/o Jane Waldron
jwaldron@tre.state.ma.us

Preview of 2024 Tax Changes

★ See CTR Tax Update Memo for full list of changes (January)

★ Standard Deduction for Tax Year 2024

- For married filing jointly: **\$29,200**
- For single taxpayers and married individuals filing separately: **\$14,600**
- For heads of households: **\$21,900**

[IRS.gov: IRS provides tax inflation adjustments for tax year 2024](#)

2024 Tax Changes (continued)

★ Qualified Transportation Fringe

- The federal exclusion for Qualified transportation and parking is **\$315/month**
- The federal exclusion for Qualified Transit passes is **\$315/month**
- DCAMM's Government Center FMV is **\$468/month**
- DCAMM's Merrimac Street FMV is **\$273/month**
(lower than monthly exclusion – no taxable reporting)

2024 Tax Changes (continued)

★ State Unemployment and EMAC

- UI rate will remain **0.2%**
- EMAC cap remains at **\$15,000** and the rate is **0.34%**

[Mass.gov: Learn About the Employer Medical Assistance Contribution](#)

Paid Family Medical Leave

★ PFML Contribution rates

- Effective January 1, 2024, the new contribution rate on eligible employees will be **0.88%**. This is an increase from the current 0.63%.
- As an employee of the Commonwealth of Massachusetts, your contribution will be **0.46%** of your wages during 2024; the Commonwealth will contribute the remaining of the remaining **0.42%** of the required **0.88%**.

★ PFML Maximum Benefit Amount

- Beginning in January 2023, the maximum total amount that an eligible employee can receive in PFML benefits will be **\$1149.90** per week. This is an increase from the current maximum benefit amount of \$1129.82.



Questions

VOYA – Qualified Transportation

Angela Thivierge

Payroll User Group Meeting

Wednesday December 6th, 2023



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

PLAN | INVEST | PROTECT



Agenda

- Commuter Choice Parking and Transit Overview
- Commuter Choice Reminders

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
- 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

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

<https://presents.voya.com/Content/Delivers/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 Voya Financial immediately –forward the email to commonwealth@voya.com
- New IRS Maximums for 2024 were announced and the new limits are \$315 for each parking and transit.

Need Help with Commuter forms or Questions? Email: Angela.Thivierge@voya.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

Commonwealth of Massachusetts Qualified Transportation Benefit Plan Yearly Certification Form

1. I hereby certify that I have been or will be using this benefit for my regular daily direct commute from home to work and return.* [Click for more information](#). I certify that this card will be used only for qualified transportation fringe benefits, Rev. Rul. 2006-57. I will not give, barter, exchange, convey, assign, or otherwise transfer this benefit to any other person.
2. I further certify that the monthly benefit that I will be receiving does not exceed my average monthly commuting costs by public transportation, excluding any parking costs, based on the average number of workdays I commute in the average month. I agree that if my commuting costs change and the monthly benefit I receive exceed my average monthly commuting costs for two or more consecutive months, I will notify Voya Financial so that my monthly benefit can be adjusted appropriately. I agree to claim my monthly benefit. I also understand that if I am not receiving the maximum allowable benefit and my commuting costs increase, I can request an increase in my benefit under the State Employee Commuter Benefits Program. I also understand that I will notify Voya Financial immediately when I plan to depart from employment.
3. I understand that the debit card remains active for use until midnight of the last day of the benefit month for which I had a payroll deduction contribution, example: Termination occurs in May, and payroll deductions are taken in May paycheck for the June benefit month, I'm allowed to use the account until June 30th.
4. I understand I am responsible for purchasing Transit products, and responsible for all requirements of safeguarding these products.

Need Help with Commuter forms or Questions? Email: Angela.Thivierge@voya.com

Commuter Reminders

5. The Employee, under penalties of perjury, certifies that he/she has not and will not claim benefits to which are not allowable under IRS and State Tax law.

6. If my employment ends from the Commonwealth of MA (no matter if due to resignation, layoff, retirement), then my Transit/Parking benefit plan will be dropped immediately, and the debit card will be deactivated – at which point I will only be able to submit manual claims for paid eligible expenses that I incurred within 180 days from the date of service, otherwise the funds will be forfeited. If I elect to end my participation and payroll contribution into the Transit/Parking benefit plan, and I still have funds available on the debit card, I can continue to use the debit card and spend down my balance or submit manual claims for paid eligible expenses. Per IRS regulations, refunds cannot be approved.

7. UberPool & Lyft: The undersigned fully understands that eligible commuter transit expenses submitted on the Reimbursement Claim Form are for rides to-and-from work.

☐ I agree

Signature *

First Name

Last Name

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@voya.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

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!

Public Records Exemption alert in HR/CMS

Eduardo Canton

Payroll Public Records Exemption

- ★ Under the public records law, M.G.L. c. 4, § 7(26), an employee's name, title, salary and department are considered public records. If a public records request is made to a department or to the Office of the Comptroller (CTR), the department and CTR are required to provide this information, including electronically.
- ★ Each department must notify its employees of the availability of the Public Records Exemption Form in a manner determined by the department
- ★ If an employee wishes to request that their information be exempt from payroll public records requests made either to the department or to CTR for statewide payroll requests, they must submit the Public Records Exemption Form

Alerts

- ★ As of Monday, November 27, an alert has been added to HR/CMS to indicate to authorized users that a current exemption must be reviewed by the department. An alert will appear for an employee with an existing exemption if:
1. The employee transfers to a different agency within the state government.
 2. The employee changes positions within their existing department.
 3. The employee leaves state service.
 4. Five years have passed since the exemption was granted.

What to do upon receipt of alerts

- ★ If the first, second, or third circumstances occur, the authorized user must review this policy and contact the employee to determine if the exemption still applies based on current circumstances. If it does, no further action is required.
- ★ Departments are reminded that, if an employee becomes an elected official or a department head, they are no longer eligible for this public records exemption. If the employee moves into one of these roles and has an existing exemption, the exemption must be removed.
- ★ If the alert appears because five years have passed since it was initially placed, the employee must be contacted by the department and asked to submit a new form for review if they want the exemption to continue.

Resources

★ Legal Authority

- M.G.L. c. 4, § 7(26), G.L. c. 66, § 10B
- M.G.L. c. 7A (Office of the Comptroller); M.G.L. c. 29 (State Finance Law)
- M.G.L. c. 265 § 24C (Sexual Assault and Rape, Confidentiality)

★ Other Resources

- Process Public Information Exemptions Job Aid (Knowledge Center & PowerDMS)
- Public Records Exemption Form
- Contacts:
 - [Office of the Comptroller Solution Desk](#)
 - Labor Counsel at HRD Ashlee Logan: Ashlee.Logan@mass.gov



Questions

Metro Credit Union

Brandon Williams



METRO
CREDIT UNION



December 2023 Updates



Retirement Loans

- Exclusive to you
- Let us help those who are transitioning to retirement
- Low rate and payment





Last Call - Calendars

Massachusetts State Employees HR/CMS Pay Calendar 2024

JANUARY

SUN	MON	TUES	WED	THURS	FRI	SAT
	1 New Year's Day	2	3	4	5 Martin Luther King Jr. Day	6
7	8	9	10	11	12	13
14	15 Presidents' Day	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

FEBRUARY

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

MARCH

SUN	MON	TUES	WED	THURS	FRI	SAT
					1 Presidents' Day	2
3	4	5	6	7	8	9
10	11	12	13	14	15 Good Friday	16
17	18	19	20	21	22	23
24 Easter Sunday	25	26	27	28	29	30

APRIL

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

MAY

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

JUNE

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

JULY

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

AUGUST

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

SEPTEMBER

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

OCTOBER

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

NOVEMBER

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

DECEMBER

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



The credit union for
Mass State
Employees



877.MY.METRO | MetroCU.org

Federally insured by NCUA | Member FDIC



Metro Insurance Advisors

- 30+ types of insurance
 - Condo
 - Renters
 - Event
 - Pet
- 40+ carriers
 - National
 - Regional





Dedicated Contact



Brandon Williams, CCUFC
Metro@Work Relationship Manager
BWilliams@MetroCU.org
877.MY.METRO ext. 5408

Upcoming Site Visits

Ashburton Place: 12/12 – 11:30am to 1:30pm

MITC Building: 12/21 – 11:30am to 1:30pm

PFML Top Off

Eduardo Canton

PFML Top Off

- ★ “Top-off” is a monetary supplement to wage replacement benefits that make an employee’s wages whole.
- ★ To top off wage replacement benefits such as PFML payments from the Department of Family and Medical Leave (DFML), employee uses their accrued paid leave to make up difference between their wage replacement benefit and their average weekly wage (AWW)
- ★ An employee’s average weekly wage is based on their actual earnings within a specified period of time (e.g., previous four calendar quarters) and may be greater than their base weekly wage.

Top Off Example

★ Key Details:

- DFML Weekly Benefit Amount: \$1000
- IAWW: \$1100
- Base Weekly Wages: \$1000
- Base Hourly Wages: \$25/hr
- Weekly Scheduled Hours: 40 hours
- Top-Off Amount: $[IAWW] - [DFML] = \$1100 - \$1000 = \$100$
- Equivalent Hours of Accrued Paid Leave (per week): $[Top-Off] \div [Hourly Rate] = \$100 \div \$25/hr = 4 \text{ hours}$

Impact to Employees

- ★ PERAC determined that top-off is not pensionable (i.e., does not count toward creditable service for retirement purposes)
- ★ Employees collecting payments from DFML will be on a combination of unpaid leave and paid leave with the Agency
 - No sick or vacation time will be accrued for period of unpaid leave
 - Employees will accrue prorated sick and vacation time for top-off hours
- ★ Combined maximum of PFML payment and accrued paid leave cannot exceed the employee's individual average weekly wage (IAWW)
- ★ The normal HR/CMS deduction schedule will apply to top-offs
 - In some cases, top-offs may not cover all of an employee's deductions

Top Off Tips

- ★ **Top-offs cannot be processed until after there is an approval from DFML; therefore, the first payment of top-off will be in arrears**
- ★ **New time reporting codes in development for the top-off amount for use by core users only (i.e., can only be entered by HR/payroll, not employee or their supervisor)**
- ★ **All top-off matters (e.g., counseling, communicating, manual calculation, processing) will be the responsibility of the Agency**



Questions

Total Administrative Services Corporation (TASC)

Amanda Odom

Flexible Spending Accounts (FSAs)

This benefit is for active state employees only.
Learn more about FSAs at

mass.gov/info-details/flexible-spending-accounts-fsas

FSA (All Agencies)

Changes

TASC has consolidated all VOYA/Benefit Strategies forms previously used into one change form which is accessed online at the massfsatasc.com website:

CHANGE TYPE:	FORM COMPLETED & SUBMITTED BY:	PROCESS:
Election Change Resulting in Drop of Election or Change in Election Due to a Qualifying Event	Member or GIC Coordinator	TASC will process based on the qualifying event type and communicate to the GIC Coordinator for adjustment of payroll
Reclassification & Payroll Refund Requests	GIC Coordinator (supporting documentation MUST be included with request)	TASC will forward request to GIC for approval/denial. Upon receipt of decision from GIC, TASC will communicate to GIC Coordinator, who will in turn communicate to member
Beginning or Ending Leave of Absence (LOA)	Member or GIC Coordinator	TASC will process based on type of LOA. If request originates with member, TASC will communicate with GIC Coordinator for adjusting payroll (as applicable)
Termination of Employment	Member or GIC Coordinator	TASC will process. If request originates with member, TASC will communicate with GIC Coordinator for applicable internal processing

Employment status changes (including leave of absence (LOA)) must be submitted within 60 days after the employment status change occurs. If a LOA status change is not provided in advance of the start of LOA, pre-pay and Direct Bill options are not available.

Coordinator must update payroll deductions, as well as update the separate FSA
Administrative fee of \$1.00 per participant/month for employees on LOA

FSAs (All Agencies)

Refunds & Reclassifications

Agency Coordinator Submits Request

- Refund and Reclassification requests should be submitted using the consolidated change form via the **massfsatasc.com** website
- You must include documentation providing details – assume the reader has no information on the case/situation
- If inadequate details are provided, you risk denial of the request

GIC Approves or Denies

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

Notice of Approval Sent to Coordinator

- Coordinators receive an email from TASC informing them of the approval/denial.
- GIC Coordinator must communicate this to the employee

You may not change or stop deductions unless you have received approval/denial confirmation from GIC

FSA's (All Agencies)

New Hire Enrollment

Reminder: All enrollments must be completed online by the employee. Employee completes election/enrollment e-form within 21 calendar days of hire date. If there is a circumstance where an employee is unable to complete the enrollment online, there is a paper enrollment form available.

New hire enrollment form can be found at massfsatasc.com

- There is a 60-day waiting period for HCSA benefit; refer to the calendar tool for HCSA effective date for new hires. No waiting period for the DCAP benefit; effective immediately from date of hire.
- When there is a new hire who has enrolled online, TASC will send a new hire enrollment report to the Coordinator. The Coordinator will enter the information into the payroll system and make sure the number of payroll deductions are accurate for a mid-year enrollment as well as set up the \$1.00 per participant per month administration fee, paid via their payroll, post tax.
- Discrepancies should be emailed to commonwealthofma@tasconline.com email

Payroll Reminders

Eduardo Canton

Who Do I Contact?

- ★ For HR/CMS issues, please log a ticket in [EOTSS ServiceNow](#), call 844-435-7629, or email MassGov@Service-now.com.
- ★ For LCM/MMARS issues, please submit an inquiry at the [CTR Solution Desk ServiceNow Portal](#).



Questions