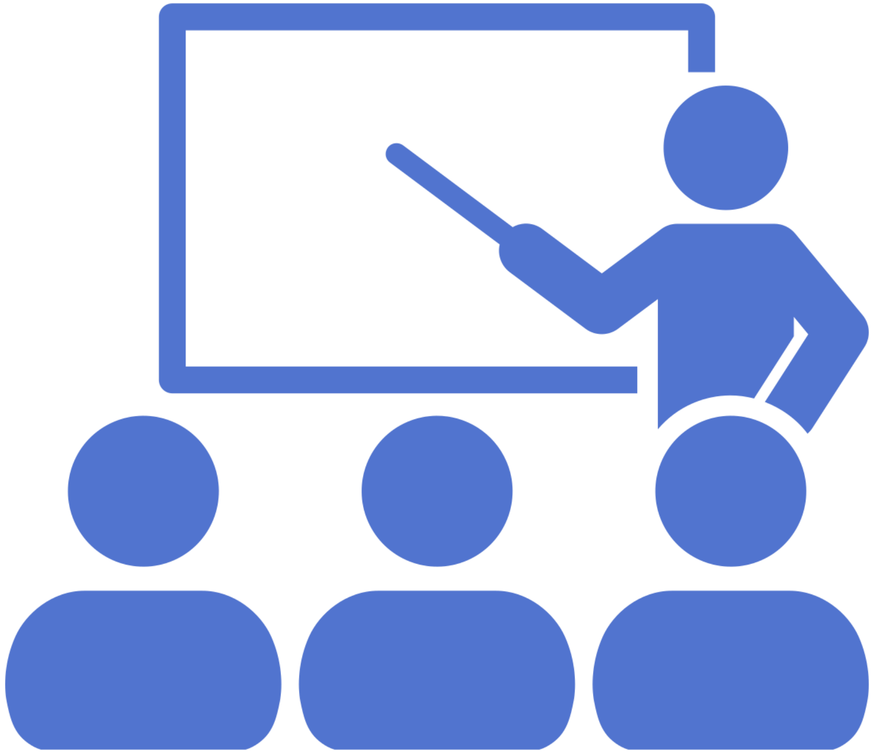
HR/CMS User Group Meeting

June 12, 2024

OFFICE OF THE COMPTROLLER
COMMONWEALTH OF MASSACHUSETTS

ATLANTIC COD | OFFICIAL STATE FISH

Welcome



- ★Virtual Webinar
- ★Chat function disabled
- ★Mute function enabled
- ★Use Q&A to ask questions
- ★Session is recorded

Agenda

- ★ Welcome - William McNamara, Comptroller
- ★ Empower/SMART Plan
- ★ Trending Topics
- ★ Metro Credit Union
- ★ GIC – No waiting period
- ★ Security Requests
- ★ Voya
- ★ Fiscal Year-End/Accounts Payable
- ★ Total Administrative Services Corp
- ★ Resources & References

Opening Remarks

William McNamara

Comptroller of the Commonwealth

Commonwealth of Massachusetts SMART Plan Update

Payroll User Group Meeting

June 12, 2024

SMART Plan Agenda

- Plan Service Center Access
- Employee Re-Enrollment
- SMART Advisor Map

Plan Service Center (PSC) Access

- If contact person leaving, notify supervisor that replacement will need to set up access

- Critical to have someone able to access deferral files

Plan Service Center (PSC) Access

How to change or add a department's primary contact:

- To make changes or add new contacts, send requests to Tom Griffin at the Comptroller's Office: Thomas.Griffin@mass.gov
- All requests must be approved by the Departments Payroll Director.
- When you make a change, please provide the following information:

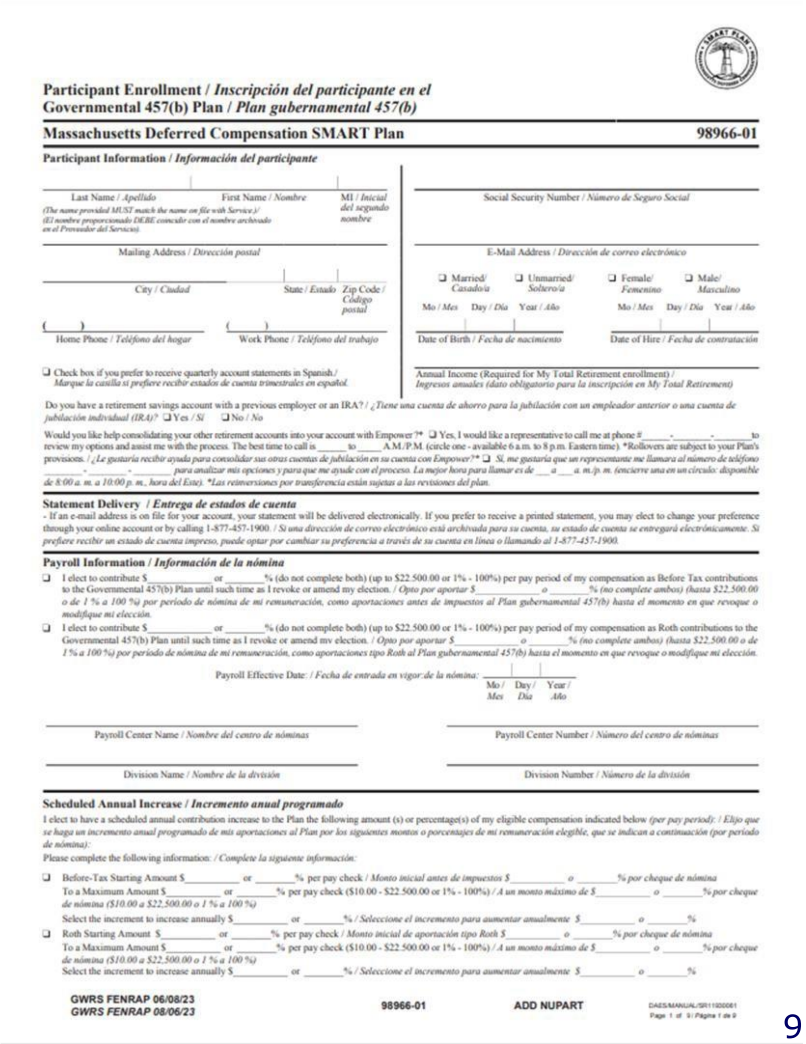
Department	Descr	Deptid	Empower ID	First Name	Last Name	Phone#	Email Address
OSC	OFFICE OF THE STATE COMPTROLLER	OSC1103	D187	Tom	Griffin	(617) 973-2552	Thomas.Griffin@mass.gov

Do not send any security requests to Empower

Plan Re-Enrollment

Participants switching from one state agency to another:

- Must submit new enrollment form
- Deferral info must be included on file feed from new division
- If you receive info for an EE that doesn't belong to you, please contact the SMART alias: smart@empower.com



Participant Enrollment / *Inscripción del participante en el* Governmental 457(b) Plan / *Plan gubernamental 457(b)*

Massachusetts Deferred Compensation SMART Plan **98966-01**

Participant Information / *Información del participante*

Last Name / *Apellido* First Name / *Nombre* MI / *Inicial del segundo nombre*

(The name provided MUST match the name on file with Service.)/ (El nombre proporcionado DEBE coincidir con el nombre archivado en el Proveedor del Servicio).

Social Security Number / *Número de Seguro Social*

Mailing Address / *Dirección postal*

E-Mail Address / *Dirección de correo electrónico*

City / *Ciudad* State / *Estado* Zip Code / *Código postal*

❑ Married/ *Casado/a* ❑ Unmarried/ *Soltero/a* ❑ Female/ *Femenino* ❑ Male/ *Masculino*

( ) Home Phone / *Teléfono del hogar* ( ) Work Phone / *Teléfono del trabajo*

Mo / *Mes* Day / *Día* Year / *Año* Date of Birth / *Fecha de nacimiento*

Mo / *Mes* Day / *Día* Year / *Año* Date of Hire / *Fecha de contratación*

❑ Check box if you prefer to receive quarterly account statements in Spanish./ *Marque la casilla si prefiere recibir estados de cuenta trimestrales en español.*

Annual Income (Required for My Total Retirement enrollment) / *Ingresos anuales (dato obligatorio para la inscripción en My Total Retirement)*

Do you have a retirement savings account with a previous employer or an IRA? / *¿Tiene una cuenta de ahorro para la jubilación con un empleador anterior o una cuenta de jubilación individual (IRA)?* ❑ Yes / *Sí* ❑ No / *No*

Would you like help consolidating your other retirement accounts into your account with Empower?* ❑ Yes, I would like a representative to call me at phone #____-____-____ to review my options and assist me with the process. The best time to call is ____ to ____ A.M./P.M. (circle one - available 6 a.m. to 8 p.m. Eastern time). *Rollovers are subject to your Plan's provisions. / *¿Le gustaría recibir ayuda para consolidar sus otras cuentas de jubilación en su cuenta con Empower?** ❑ *Sí, me gustaría que un representante me llamara al número de teléfono ____-____-____ para analizar mis opciones y para que me ayude con el proceso. La mejor hora para llamar es de __ a __ a. m./p. m. (encierre una en un círculo: disponible de 8:00 a. m. a 10:00 p. m., hora del Este). *Las reinversiones por transferencia están sujetas a las revisiones del plan.*

Statement Delivery / *Entrega de estados de cuenta*

- If an e-mail address is on file for your account, your statement will be delivered electronically. If you prefer to receive a printed statement, you may elect to change your preference through your online account or by calling 1-877-457-1900. / *Si una dirección de correo electrónico está archivada para su cuenta, su estado de cuenta se entregará electrónicamente. Si prefiere recibir un estado de cuenta impreso, puede optar por cambiar su preferencia a través de su cuenta en línea o llamando al 1-877-457-1900.*

Payroll Information / *Información de la nómina*

❑ I elect to contribute $____ or ____% (do not complete both) (up to $22,500.00 or 1% - 100%) per pay period of my compensation as Before Tax contributions to the Governmental 457(b) Plan until such time as I revoke or amend my election. / *Opto por aportar $____ o ____% (no complete ambos) (hasta $22,500.00 o de 1 % a 100 %) por período de nómina de mi remuneración, como aportaciones antes de impuestos al Plan gubernamental 457(b) hasta el momento en que revoque o modifique mi elección.*

❑ I elect to contribute $____ or ____% (do not complete both) (up to $22,500.00 or 1% - 100%) per pay period of my compensation as Roth contributions to the Governmental 457(b) Plan until such time as I revoke or amend my election. / *Opto por aportar $____ o ____% (no complete ambos) (hasta $22,500.00 o de 1 % a 100 %) por período de nómina de mi remuneración, como aportaciones tipo Roth al Plan gubernamental 457(b) hasta el momento en que revoque o modifique mi elección.*

Payroll Effective Date: / *Fecha de entrada en vigor de la nómina:* Mo / *Mes* Day / *Día* Year / *Año*

Payroll Center Name / *Nombre del centro de nóminas* Payroll Center Number / *Número del centro de nóminas*

Division Name / *Nombre de la división* Division Number / *Número de la división*

Scheduled Annual Increase / *Incremento anual programado*

I elect to have a scheduled annual contribution increase to the Plan the following amount (s) or percentage(s) of my eligible compensation indicated below *(per pay period)*: / *Elijo que se haga un incremento anual programado de mis aportaciones al Plan por los siguientes montos o porcentajes de mi remuneración elegible, que se indican a continuación (por período de nómina):*

Please complete the following information: / *Complete la siguiente información:*

❑ Before-Tax Starting Amount $____ or ____% per pay check / *Monto inicial antes de impuestos $____ o ____% por cheque de nómina*
To a Maximum Amount $____ or ____% per pay check ($10.00 - $22,500.00 or 1% - 100%) / *A un monto máximo de $____ o ____% por cheque de nómina ($10.00 a $22,500.00 o 1 % a 100 %)*
Select the increment to increase annually $____ or ____% / *Seleccione el incremento para aumentar anualmente $____ o ____%*

❑ Roth Starting Amount $____ or ____% per pay check / *Monto inicial de aportación tipo Roth $____ o ____% por cheque de nómina*
To a Maximum Amount $____ or ____% per pay check ($10.00 - $22,500.00 or 1% - 100%) / *A un monto máximo de $____ o ____% por cheque de nómina ($10.00 a $22,500.00 o 1 % a 100 %)*
Select the increment to increase annually $____ or ____% / *Seleccione el incremento para aumentar anualmente $____ o ____%*

GWRS FENRAP 06/08/23
GWRS FENRAP 08/06/23
98966-01
ADD NUPART
DAES/MANUAL/SR11000061
Page 1 of 9 / Página 1 de 9

SMART Retirement Plan Advisors

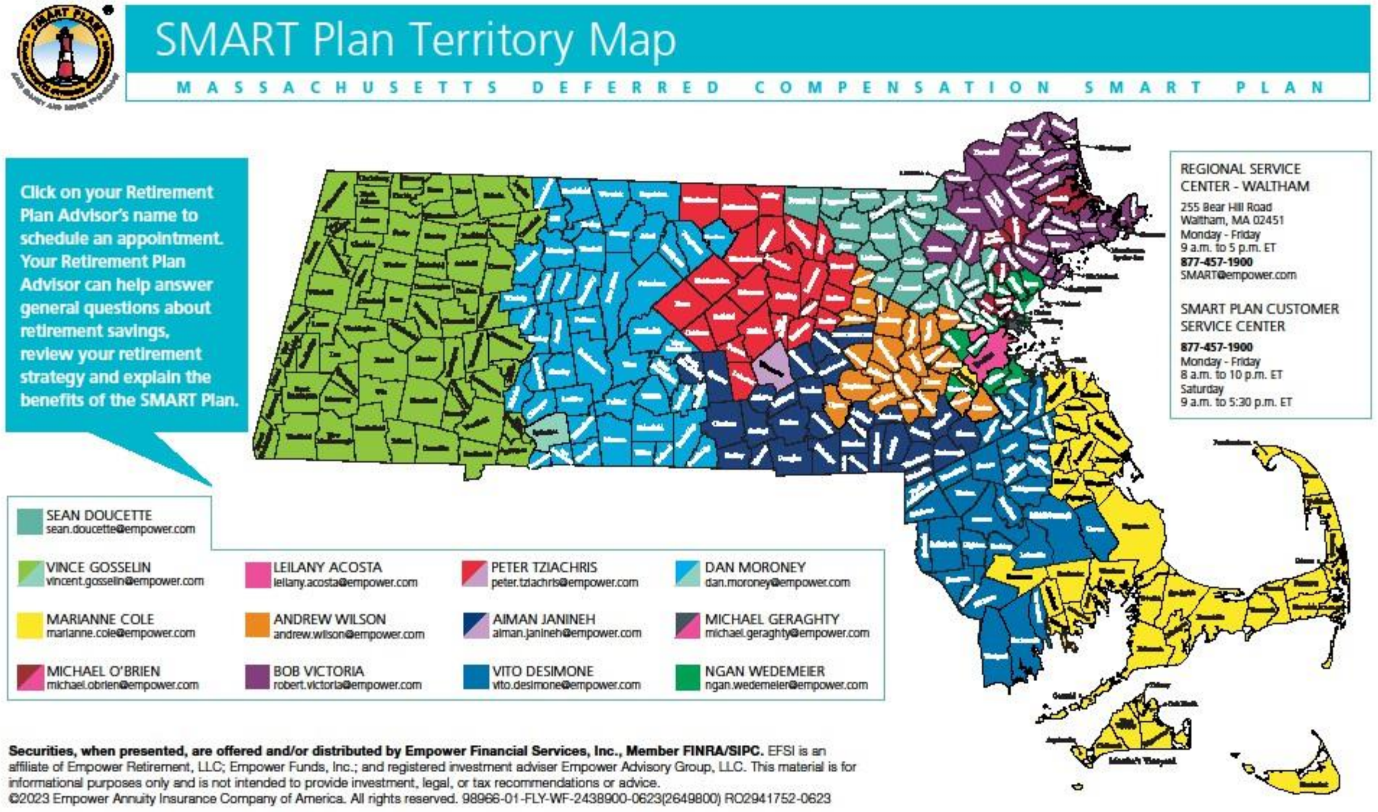
- RPA's always available to meet with employees at work location or virtually

- Individual appointments can be booked via interactive map on SMART Plan website:

  www.mass-smart.com>

  Plan Resources>

  Find your Representative



Questions?

SMART@Empower.com

Thank you

Trending Topics

Evanice Henniger

Director of Business Partner Engagement

Non-Resident Alien (NRA)

- ★Any individual who is not a US citizen or permanent resident
- ★An alien who has not passed the green card test or the substantial presence test
- ★For tax purposes, NRAs have a different method of having tax withheld, complete different tax forms and documents, and are eligible for very few and limited deductions

Agency Responsibility

- ★ Employee’s work authorization should be checked before they begin working or on the day of hire
- ★ Must inform the Statewide Payroll Team to enroll the employee in Sprintax, if:
  - The employee checks box 2 or box 4 in Section 1 of the I-9 form
  - The employee does not have a Social Security Number
  - The employees Social Security card reads "Valid For Work Only with DHS Authorization" or "Valid For Work Only With INS Authorization"
- ★ Properly enter and maintain identification data in HR/CMS
- ★ Properly enter and maintain employee tax data in HR/CMS

Employee Responsibility

- ★Complete Sprintax profile and provide all requested documentation
- ★Always maintain legal employment status; it is the employee's responsibility to ensure there is adequate planning time to maintain their legal/work status
- ★Notify the Office of International Education at their institution of any Visa status changes
- ★Notify agency HR/Payroll of Visa changes, Tax status, Change of Address, Treaty benefits, etc.

Determining Taxes & Tax Treaties

- ★ To determine an employee's tax status and eligibility for a tax treaty, all non-U.S. citizens who receive compensation, scholarships or fellowships from the Commonwealth must first provide the required information and complete the necessary forms using Sprintax, the Commonwealth's secure Online Tax Compliance System
- ★ Ideally, this information should be provided prior to any payment so that the correct tax withholding and reporting decisions are made; failure to do so may result in the maximum rate of tax withholding (30%)

Annual Maintenance of Tax Treaties

- ★ NRAs must complete updated tax forms each calendar year if they are claiming a tax treaty exemption on wages and/or scholarships provided by the Commonwealth.
- ★ In December of each year, agency Payroll staff will receive an email from the Statewide Payroll Team requesting that the employee update the upcoming year's treaty forms for active employees entitled to treaty benefits.

Tax Treaty

- ★The U.S. tax liability of aliens is determined primarily by the provisions of the U.S. Internal Revenue Code. However, the United States has entered into certain agreements known as tax treaties with several foreign countries which oftentimes override or modify the provisions of the Internal Revenue Code.
- ★The primary purpose of a tax treaty is to avoid double taxation by exempting an individual from all or part of the federal and state taxes withheld from payroll payments
- ★The existence of an income tax treaty between the U.S. and an individual's home country does not mean that an individual will automatically be exempt from taxes; each individual's case is unique
- ★In order to be exempt from taxes, each individual must meet specific qualifications and have a valid U.S. tax identification number

Visa Types (Most Common)

- F-1: Foreign Students. On-campus work permitted by USCIS regulations (with restrictions – i.e. 20 hours/week when school is in session, 40 hours/week during school vacations); Off-campus work possible if employer has filed labor attestation or student has been approved for practical training; Off-campus permission given on 3rd page of I20 or on EAD.
- J-1 Student: Students in the U.S. under Exchange Visitor Program. May work on- or off campus if granted permission by Exchange Visitor sponsor.

Visa Types (Less Common)

- ★J-1 Professor, Research Scholar: Researchers, professors, scholars here under Exchange Visitor program. May work for university academic department or organization that issued or is listed on DS-2019 form; permission for other work granted by petition to U.S. Information Agency.
- ★J-1 Short-term Scholar: Short-term researchers & professors. Limited to 6 month stay. No extensions permitted. May work for the university academic department or organization that issued or is listed on DS-2019 form; permission for other work granted by petition to U.S. Information Agency.

Visa Types (Sponsored)

- H-1A: Registered Nurses. Can only be paid by the facility that filed the labor attestation & applied for the H-1A.
- H-1B: Temporary workers in a specialty occupation other than nurses, agricultural workers, athletes or entertainers. Visa is job specific – can only be paid by the organization which filed the petition for H-1 status.

Questions

METRO
CREDIT UNION

The credit union for Massachusetts State Employees

June 2024 Updates

Recent Communications

- Nearly 150 rejections
- Add my email to *Safe Sender* list

METRO CREDIT UNION

Financial Webinars to Help Your Employees Get Ahead

It's Financial Literacy Month! April is all about helping your employees make smart financial decisions that will help them build a healthy financial future.

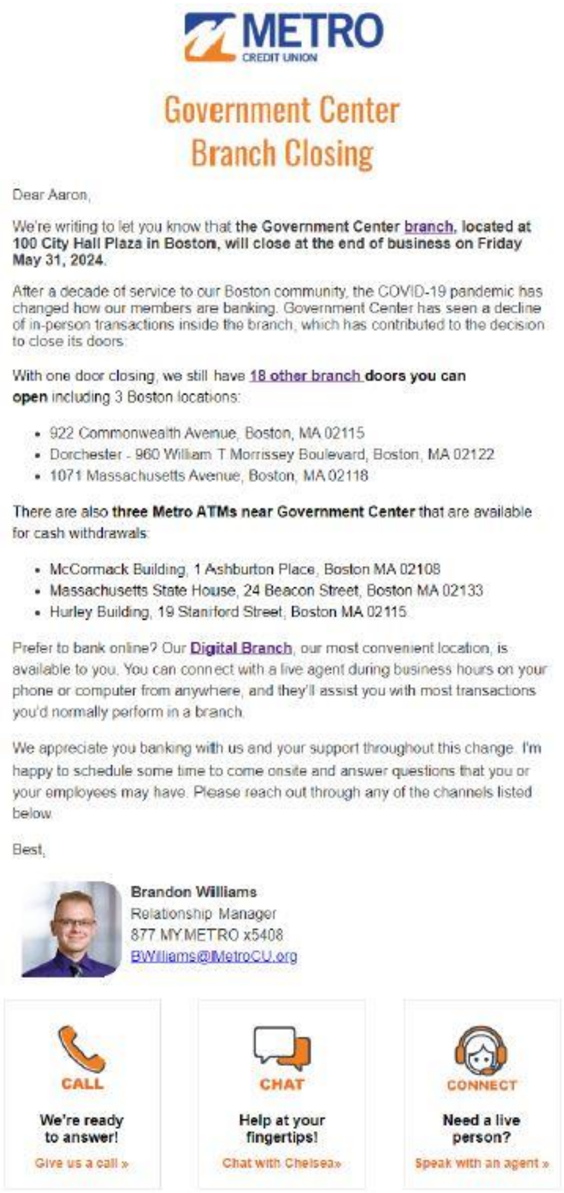
A great place for them to start is by attending Metro's upcoming webinars. They can join from wherever it's convenient, take notes at their own pace, and ask questions of our financial experts.

Please share this information with your employees so they can **secure their spot** today.

Seminar Topics

Teens & Money – Wednesday, April 17, 2024 @ 6 p.m. EST
This is a great opportunity for the teen in your life to learn about managing money effectively, preparing for common upcoming bills, opening checking and savings accounts, establishing credit (and using it wisely), and understanding investing options.

Register Now!



METRO CREDIT UNION

Government Center Branch Closing

Dear Aaron,

We're writing to let you know that **the Government Center branch, located at 100 City Hall Plaza in Boston, will close at the end of business on Friday May 31, 2024.**

After a decade of service to our Boston community, the COVID-19 pandemic has changed how our members are banking. Government Center has seen a decline of in-person transactions inside the branch, which has contributed to the decision to close its doors.

With one door closing, we still have 18 other branch **doors you can open** including 3 Boston locations:

- 922 Commonwealth Avenue, Boston, MA 02115
- Dorchester - 960 William T Morrissey Boulevard, Boston, MA 02122
- 1071 Massachusetts Avenue, Boston, MA 02118

There are also **three Metro ATMs near Government Center** that are available for cash withdrawals:

- McCormack Building, 1 Ashburton Place, Boston MA 02108
- Massachusetts State House, 24 Beacon Street, Boston MA 02133
- Hurley Building, 19 Staniford Street, Boston MA 02115

Prefer to bank online? Our Digital Branch, our most convenient location, is available to you. You can connect with a live agent during business hours on your phone or computer from anywhere, and they'll assist you with most transactions you'd normally perform in a branch.

We appreciate you banking with us and your support throughout this change. I'm happy to schedule some time to come onsite and answer questions that you or your employees may have. Please reach out through any of the channels listed below.

Best,

Brandon Williams
Relationship Manager
877 MY METRO x5408
BWilliams@MetroCU.org

CALL	CHAT	CONNECT
We're ready to answer!	Help at your fingertips!	Need a live person?
Give us a call »	Chat with Chelsea»	Speak with an agent »

2025 Calendars

- Calendar orders will start early October
- **Deadline: Wednesday, November 13th**
- 3 Ship Dates
  - 11/18/24 (Guaranteed by EOY)
  - 12/16/24
  - 1/13/25 (Final Ship Date)

New In 2024

Recent Developments

Special Program – Summer Interns

- Now available for those <18
- Revamped Seminar – *Preparing for Financial Independence*

COMING SOON – Metro Checking

- Same great features & benefits
- PLUS – added convenience

Switching Just Got Easier

- New Service to help you save
- Easy Enrollment – eStatements, iBanking, etc

Dedicated Contact

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

Upcoming Site Visits

Ashburton Place: 2nd Tuesday every month
MITC Building: 3rd Thursday every month
Springfield State Building: 8/20 – 11:30am to 1:30pm

Commonwealth of Massachusetts
Group Insurance Commission

HR/CMS Core Users–RWP Follow Up & Review

June 12, 2024

Mass.gov/GIC

@MassGIC

MA Group Insurance Commission

Group Insurance Commission

1. Introductions & Update

Agenda

1	Introductions & Update
2	Review Rule Change
3	Critical Items to Note
4	Q&A
5	MAGIC Demo
6	Resources

Change Enablement Updates

Previous	Current	Upcoming/ Ongoing
• Presentations across GIC agencies • Email communications • RWP primer in annual enrollment training deck • RWP Trainings Completed	• GIC web page resources • FAQs and follow up emails • Preparation for HRAC and HR/CMS Core Users follow-up presentations	• FAQ Development • Email campaign with reminders, recordings, and other resources • GIC web page resources

Change Enablement Updates—Coordinator Trainings

Coordinator Type	Sent	Registered	Attended	Q&A
Online	133	233	173	90
Offline	211	148	107	100
Municipal	47	89	62	70

Personal emails were sent to **every individual** who had not registered for the trainings to ensure awareness of the change and the trainings, as well as the availability of recordings after the trainings.

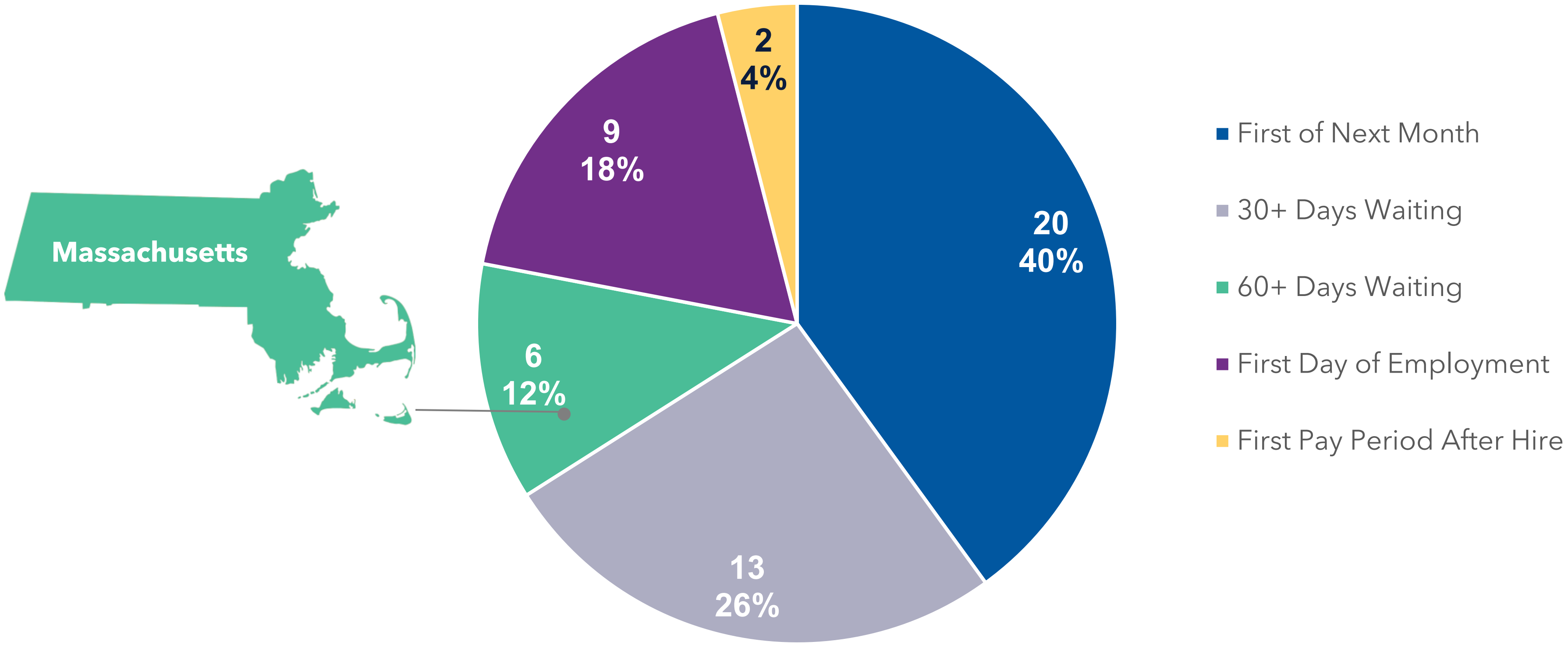
2. Review Rule Change

Reduction of 60-day Minimum Waiting Period

- The FY2024 budget mandated the reduction of the waiting period for GIC benefits for all eligible new hires.
  - "… such health insurance coverage shall be effective as of the employee's start date if the employment start date falls on the first day of the month or as of the first day of the month following the employee's start date if the employment start date falls on any day other than the first day of the month."
- The provision is effective on July 1, 2024.
- GIC, in partnership with A&F and A&F-IT, conducted a thorough and intensive assessment at the outset of this project.
- From this assessment, it was apparent that leveraging existing systems and processes to reduce the waiting period was the best path forward.
- This reduction will eliminate gaps in coverage for many new hires.

Reducing the waiting period will position Massachusetts in line with majority of state employee plan offerings across the country.

Current Implementation by State



Reducing the waiting period will bring the average waiting period from 73 days to 15 days, a reduction of nearly 80%, which will eliminate potential gaps in coverage for many new employees.

		Waiting Days								
Waiting Period	**Year**	**0- 9**	**10-20**	**20-31**	**32-39**	**40-49**	**50-59**	**60-69**	**70-79**	**80-89**
Current	2023						2%	41%	22%	35%
	2022						1%	37%	28%	34%
	2021						1%	40%	28%	31%
	2020						1%	38%	28%	33%
RWP	2023	29%	26%	45%						
	2022	32%	29%	39%						
	2021	33%	26%	41%						
	2020	27%	28%	45%						

3. Critical Items to Note

Anyone hired before July 1st, 2024 will be subject to the 60-day minimum waiting period, <u>without exception.</u>

- Anyone beginning July 1st or later will be eligible for the reduced waiting period.
- Please be mindful of this when hiring around this time
  - New employees starting on Monday, July 1 should have their official effective date of hire also be Monday, July 1 rather than Sunday, June 30th
- Members will still have 21 days to elect benefits.

New hire information should be entered into HR/CMS on or before the date of hire.

- Doing so will trigger a registration email from the MyGICLink Member Benefits Portal between 24 and 48 hours after the new hire's start date, allowing the member to make elections swiftly.
- The registration email will be sent to the email address the employee provided and may be a personal or business email.
- Failing to do so will delay the registration email and will therefore delay access to make benefit elections.

Most new hires will receive a bill from the GIC for the first month's premium

- Bills are not available immediately at the time of enrollment. Members will receive an email notification with an important message in MyGICLink when GIC issues a bill.
- Once the bill is mailed to the member, the member can also view and pay their bill through MyGICLink or via mail/check. **Members will have 60 days to pay the bill to the GIC.**
- Members should pay their bill by the due date indicated and **must** pay the bill within 60 days or risk termination of insurance, leaving them without insurance and unable to re-enroll until annual enrollment time (April).
- Coordinators should inform new hires to expect a bill for premiums owed and encourage employee to pay bill.
- Coordinators should encourage members to make elections as soon as possible in order to start deductions.
- Each month has two deductions, based on the payroll calendar, which pay for the upcoming month's premiums.
- In order for deductions to be taken, an application must be completed prior to the deduction cut-off in prior week.
- A new deduction schedule is available in the MAGIC system under the help tab to show GIC's deduction schedule and explain how premiums are billed.

Carriers will receive new member information from the GIC with increased frequency to allow for timely enrollment

- GIC is increasing frequency of file transfers to carriers to speed up member onboarding with carriers.
- Carriers will provide a new "Welcome" email to new members with plan information in advance of the standard, existing emails that go to new members.
- These emails will be sent to the address the member provides during the elections process.
- Carriers are responsible for issuing membership cards immediately.

Preparing for Change

Review the training presentation, recording, and FAQs & share with the appropriate personnel in your agencies

Enter all new hire information into HR/CMS on or before the date of hire

- This will trigger a MyGICLink registration email to the new employee within 48 hours of their effective date of hire

Encourage exclusive use of MyGICLink Portal (rather than online forms or paper) and collect email addresses

- Members must provide a personal or business email for purposes of registering for the MyGICLink Portal

Inform new hires to expect a bill for premiums owed and reinforce the importance of paying on time

- Non-payment will result in termination of insurance with no ability to re-enroll until the next Annual Enrollment cycle

GIC is updating regulations & issuing an administrative bulletin with further guidance

- Hearing held on April 10, 2024; Regulations approved at the May 16 meeting of GIC Board
- Promulgation effective for July 1, 2024, date
- Administrative bulletin on the agenda for the June 20th meeting of the GIC Board

4. Q&A

MyGIC Link

MyGICLink Allows GIC Members To:

- View benefits 24/7 throughout the year
- Securely update personal information
- Update benefits during GIC's Annual Enrollment period or when experiencing a qualifying event
- Update dependent(s), if applicable
- Chat with GIC staff, and much more!

Members can find MyGICLink registration instructions and resources on mass.gov/gic

Encourage Members to Register for the
MyGICLink Member Benefits Portal

- All state and municipal active employees and retirees with a valid email address on GIC records who are covered by GIC Benefits have access to MyGICLink to view and make changes to their GIC coverage online.

- GIC encourages employees to provide their preferred email address to receive communications and have access the new Member Benefits Portal.

- **View MyGICLink Promotion Materials on mass.gov/gic:**

Use graphics and copy to let your agency's GIC members know about the fastest and most efficient way to manage their GIC benefits, MyGIClink.

Commonwealth of Massachusetts
Group Insurance Commission

Thank You

Mass.gov/GIC

@MassGIC

MA Group Insurance Commission

Group Insurance Commission

5. MAGIC Demo

Verifying a New Hire in MAGIC
(HR/CMS & UMass Agencies)

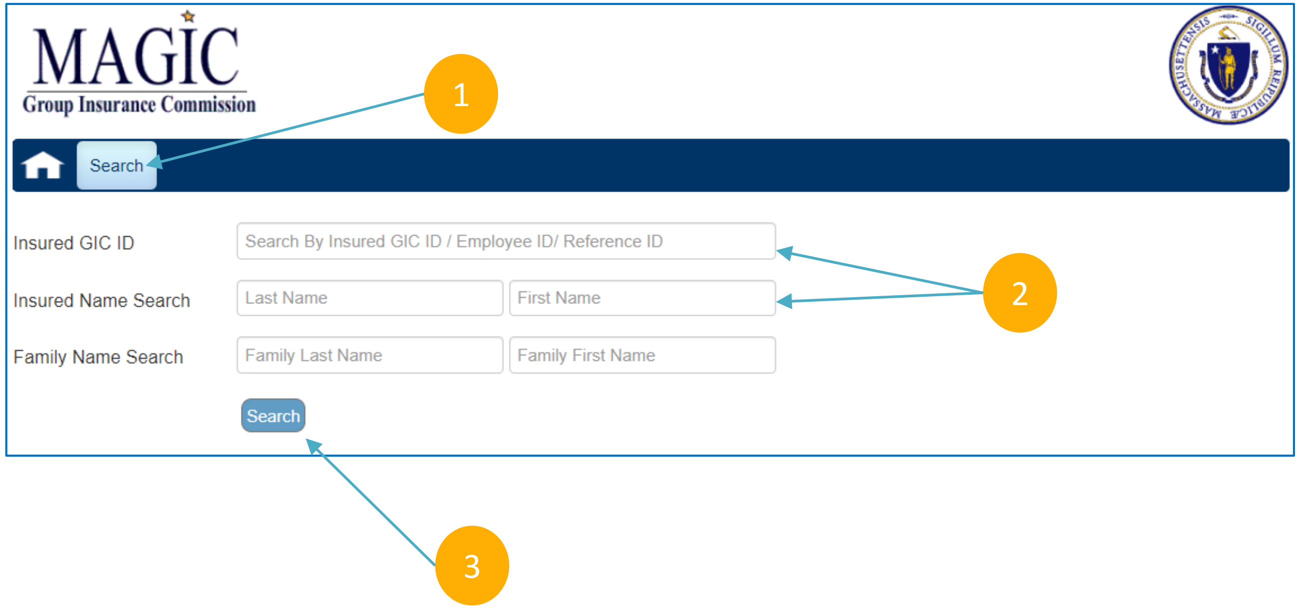
Verifying a New Hire in MAGIC (HR/CMS & UMass Agencies)

GIC receives new hire transactions nightly from HR/CMS and UMass Payroll systems. To verify do the following:

1. Go to the MAGIC **Search** page.

2. Use one of the two categories to search by:
    - **Insured GIC ID** - Reference ID, Employee ID or Social Security Number (SSN).
    - **Insured Name Search -** First and Last name of Insured.

3. Click **Search**.



Verifying a New Hire in MAGIC (HR/CMS & UMass Agencies)

1. The New Hire's account is displayed.

2. Verify the member has a **Preferred Email** address listed.
   *If a **Preferred Email** address is not listed the Welcome Registration email will be sent to the **Home Email** address. If no Home Email address is listed the email will be sent to the **Work Email** address.

   *The Welcome Registration email will be sent within 24-48 hours to the **Preferred Email.**

3. **Portal Registered** will update to **Yes** once the employee has registered.

GIC-ID:		NAME:	EMPLOYEE, SAMPLE	SEX:	
SSN:		ADDRESS:	1 TEST LANE BOSTON, MA 02108		
EMPLOYEE ID:					
STATUS:	ACT	AGENCY / DIVISION:		DOB:	
HIRE DATE:		SALARY ($):		SALARY EFF DATE:	
FULL TIME HOURS:	40.00	STANDARD HOURS:	40.00		
REFERENCE NO:		TERM DATE:		TERM REASON:	

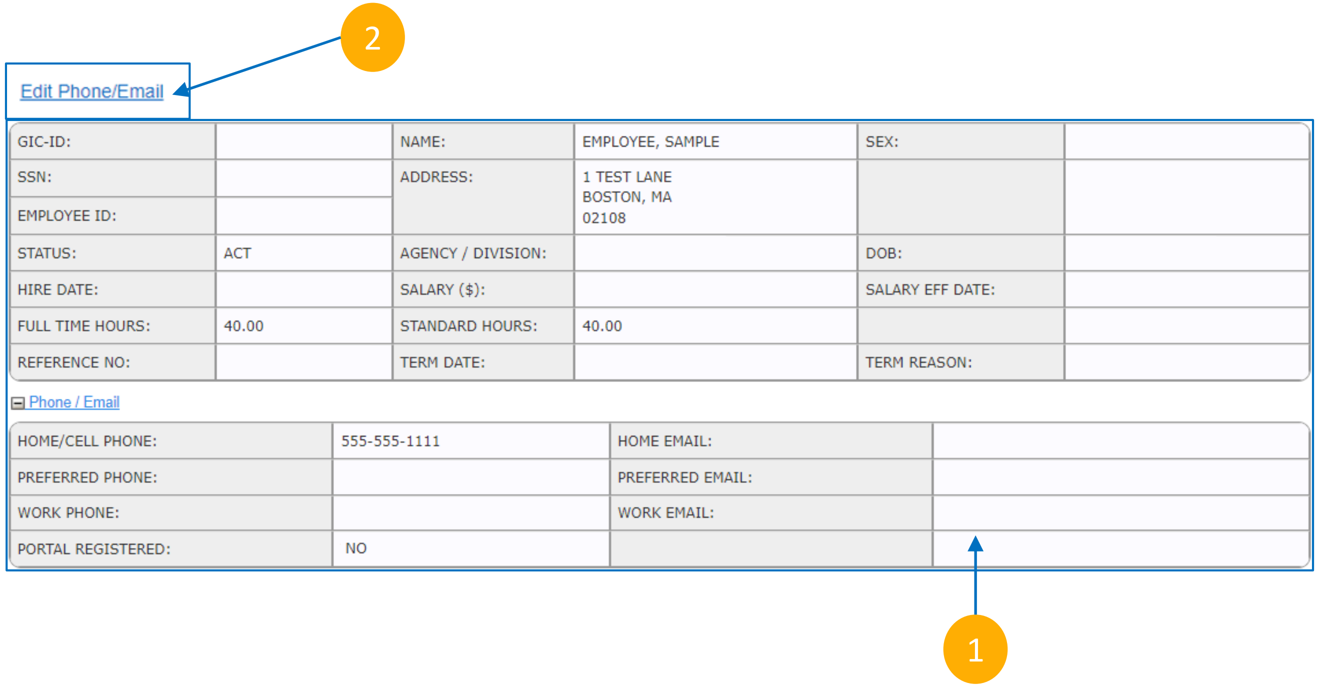
Phone / Email

HOME/CELL PHONE:	555-555-1111	HOME EMAIL:	testemailaddress@mail.com
PREFERRED PHONE:		PREFERRED EMAIL:	sampleemployee@mail.com
WORK PHONE:		WORK EMAIL:	testemployee@mail.com
PORTAL REGISTERED:	NO		

Verifying a New Hire in MAGIC (HR/CMS & UMass Agencies)

1. If a New Hire has no email address listed.

2. Click **Edit Phone/Email**.



Edit Phone/Email

GIC-ID:		NAME:	EMPLOYEE, SAMPLE	SEX:	
SSN:		ADDRESS:	1 TEST LANE BOSTON, MA 02108		
EMPLOYEE ID:					
STATUS:	ACT	AGENCY / DIVISION:		DOB:	
HIRE DATE:		SALARY ($):		SALARY EFF DATE:	
FULL TIME HOURS:	40.00	STANDARD HOURS:	40.00		
REFERENCE NO:		TERM DATE:		TERM REASON:	

Phone / Email

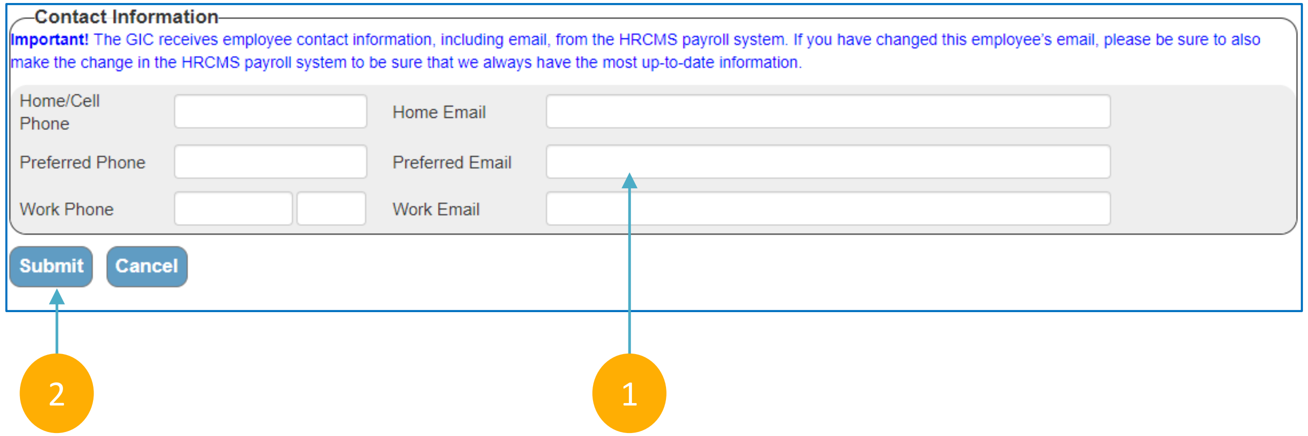
HOME/CELL PHONE:	555-555-1111	HOME EMAIL:	
PREFERRED PHONE:		PREFERRED EMAIL:	
WORK PHONE:		WORK EMAIL:	
PORTAL REGISTERED:	NO		

Verifying a New Hire in MAGIC (HR/CMS & UMass Agencies)

1. Enter the **Preferred Email** address.

   *The Welcome Registration email is sent to **Preferred Email** address first. If a Preferred Email address is not listed the Welcome Registration email will be sent to the **Home Email** address. If no Home Email address is listed the email will be sent to the **Work Email** address.

2. Click **Submit**.



Verifying a New Hire in MAGIC (HR/CMS & UMass Agencies)

1. Confirm the email address is correct.

2. The Welcome Registration email will be sent within 24-48 hours of the email address being added.

GIC-ID:		NAME:	EMPLOYEE, SAMPLE	SEX:	
SSN:		ADDRESS:	1 TEST LANE BOSTON, MA 02108		
EMPLOYEE ID:					
STATUS:	ACT	AGENCY / DIVISION:		DOB:	
HIRE DATE:		SALARY ($):		SALARY EFF DATE:	
FULL TIME HOURS:	40.00	STANDARD HOURS:	40.00		
REFERENCE NO:		TERM DATE:		TERM REASON:	

Phone / Email

HOME/CELL PHONE:	555-555-1111	HOME EMAIL:	
PREFERRED PHONE:		PREFERRED EMAIL:	SAMPLEEMPLOYEE@MAIL.COM
WORK PHONE:		WORK EMAIL:	
PORTAL REGISTERED:	NO		

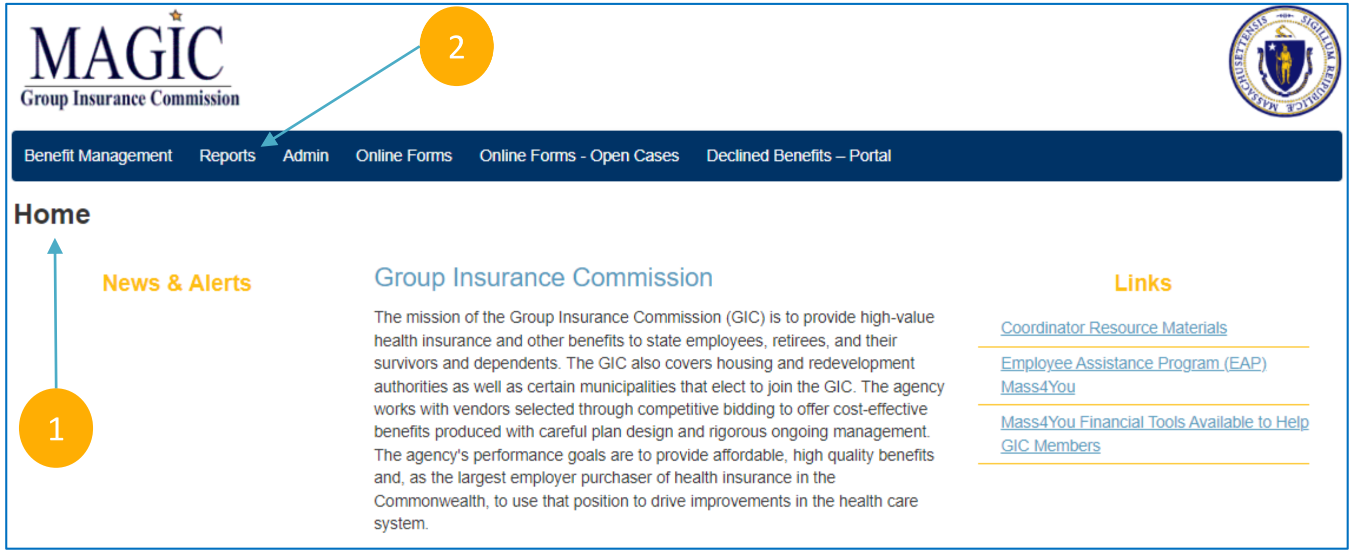
1

6. Resources

MAGIC & GIC Website

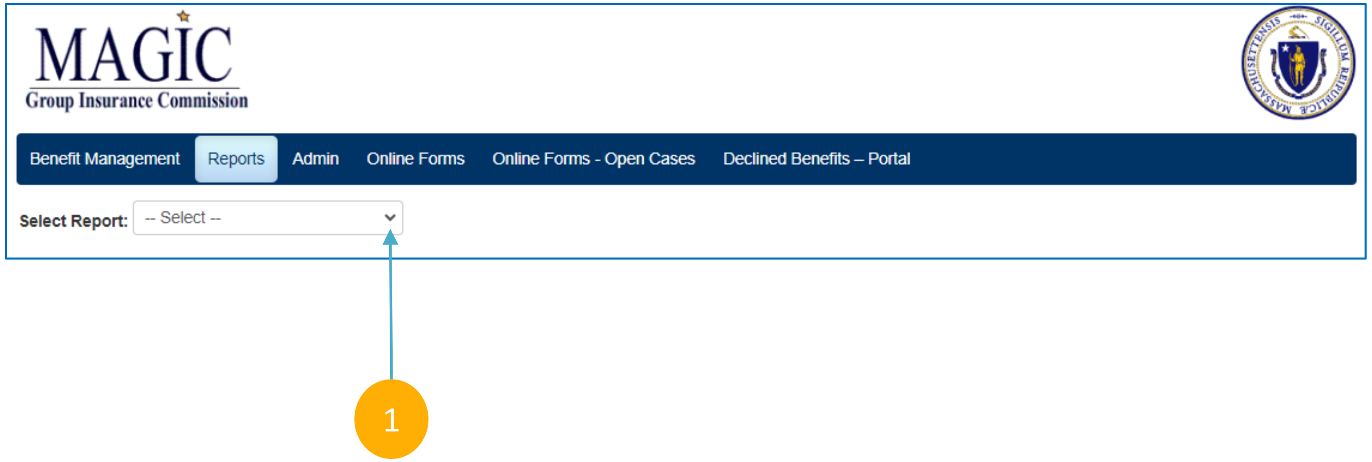
Agency Insured Report in MAGIC (HR/CMS & UMass Agencies)

1. Go to the MAGIC **Home** page.
2. Click **Reports.**



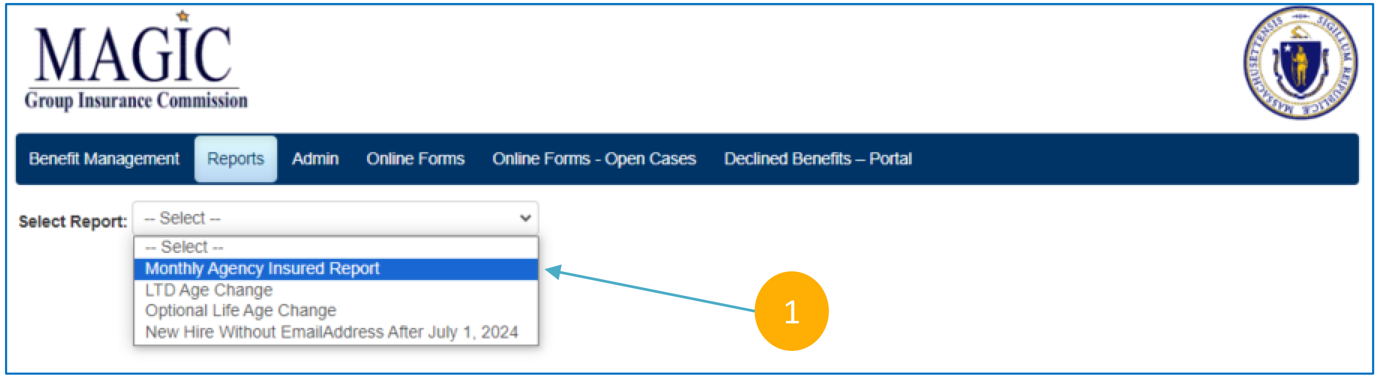
Agency Insured Report in MAGIC (HR/CMS & UMass Agencies)

1. Click the **Dropdown** arrow.



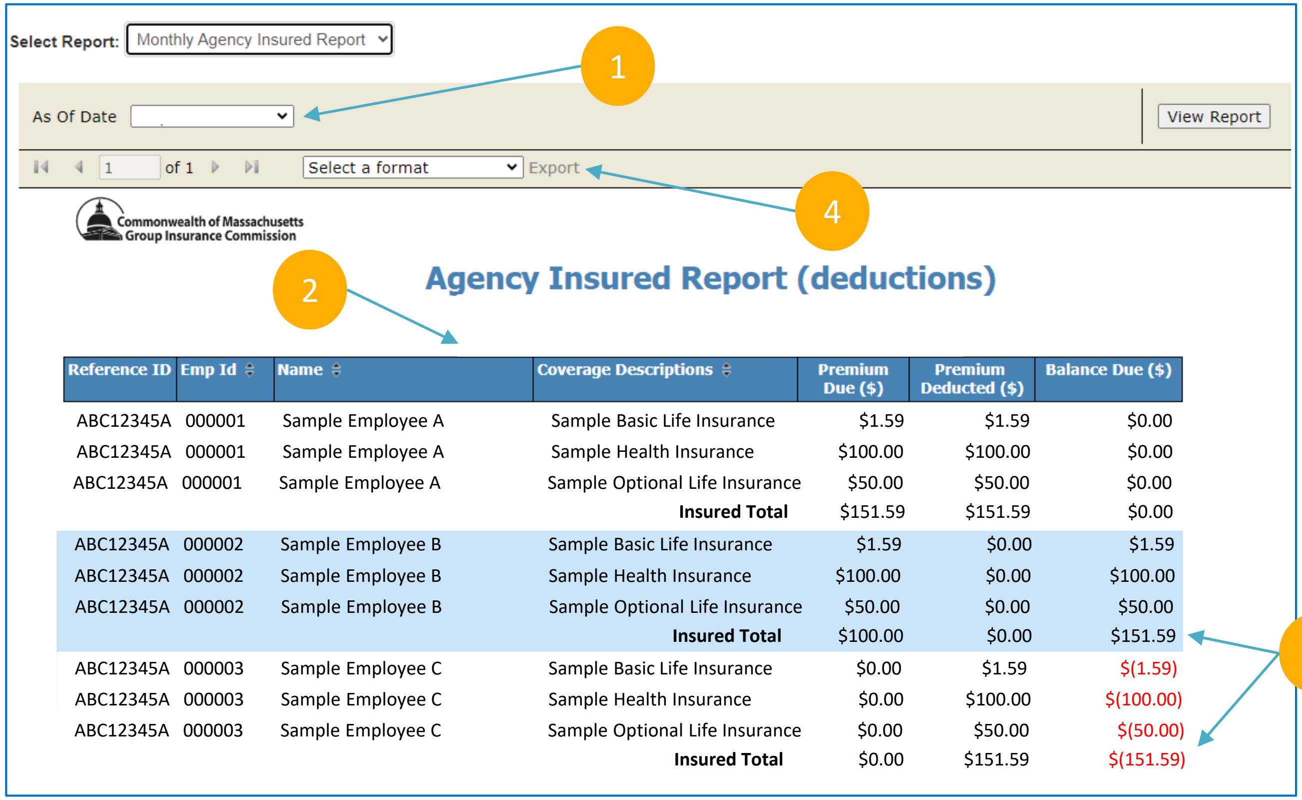
Agency Insured Report
in MAGIC (HR/CMS & UMass Agencies)

1. Click the **Monthly Agency Insured Report.**



Agency Insured Report in MAGIC (HR/CMS & UMass Agencies)

1. Select the **As of Date**.
2. See detailed deductions for employees.
3. **Amount Owed** by employee is listed in black.
   Refund Due to employee is listed in red.
4. **Select a format** and click **Export** to save a copy.



Select Report: Monthly Agency Insured Report

As Of Date

View Report

1 of 1 Select a format Export

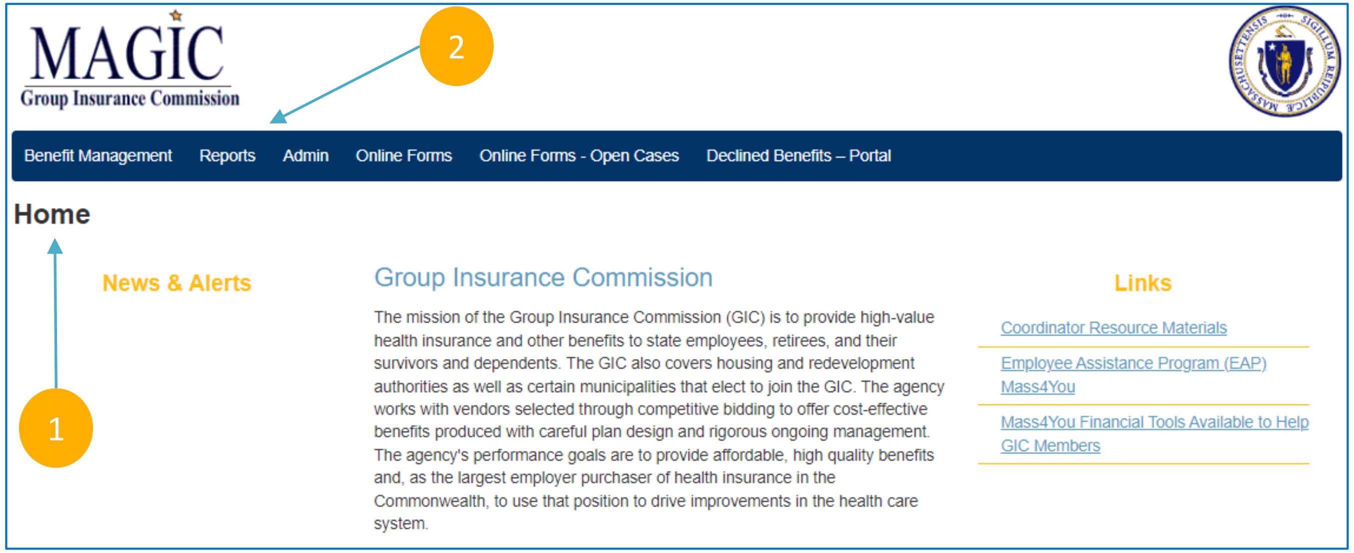
Commonwealth of Massachusetts
Group Insurance Commission

Agency Insured Report (deductions)

Reference ID	Emp Id	Name	Coverage Descriptions	Premium Due ($)	Premium Deducted ($)	Balance Due ($)
ABC12345A	000001	Sample Employee A	Sample Basic Life Insurance	$1.59	$1.59	$0.00
ABC12345A	000001	Sample Employee A	Sample Health Insurance	$100.00	$100.00	$0.00
ABC12345A	000001	Sample Employee A	Sample Optional Life Insurance	$50.00	$50.00	$0.00
			Refund Total	$151.59	$151.59	$0.00
ABC12345A	000002	Sample Employee B	Sample Basic Life Insurance	$1.59	$0.00	$1.59
ABC12345A	000002	Sample Employee B	Sample Health Insurance	$100.00	$0.00	$100.00
ABC12345A	000002	Sample Employee B	Sample Optional Life Insurance	$50.00	$0.00	$50.00
			Insured Total	$100.00	$0.00	$151.59
ABC12345A	000003	Sample Employee C	Sample Basic Life Insurance	$0.00	$1.59	$(1.59)
ABC12345A	000003	Sample Employee C	Sample Health Insurance	$0.00	$100.00	$(100.00)
ABC12345A	000003	Sample Employee C	Sample Optional Life Insurance	$0.00	$50.00	$(50.00)
			Insured Total	$0.00	$151.59	$(151.59)

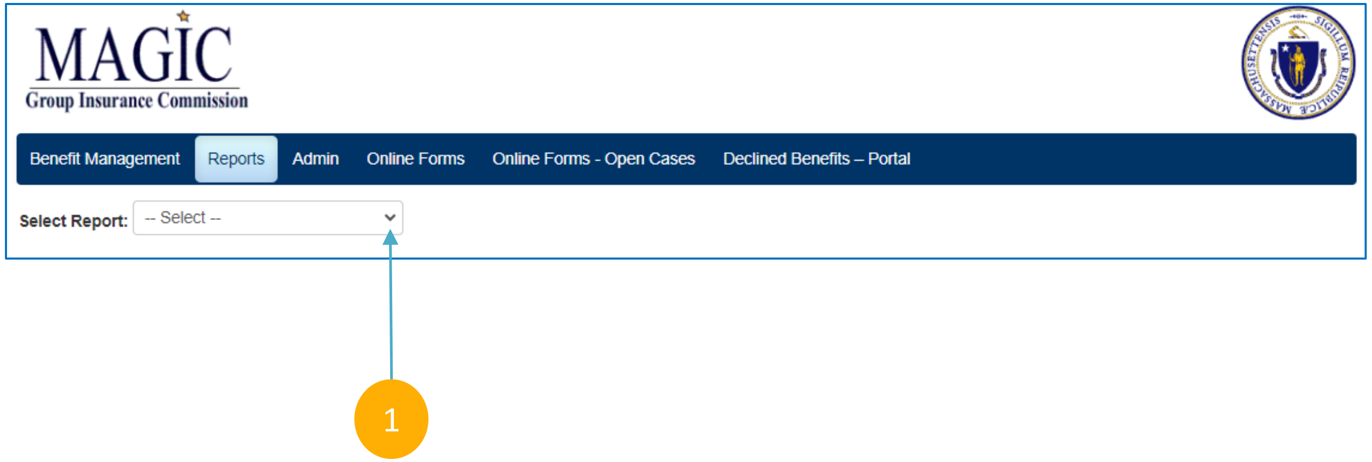
Missing Email Address Report in MAGIC (HR/CMS & UMass Agencies)

1. Go to the MAGIC **Home** page.
2. Click **Reports.**



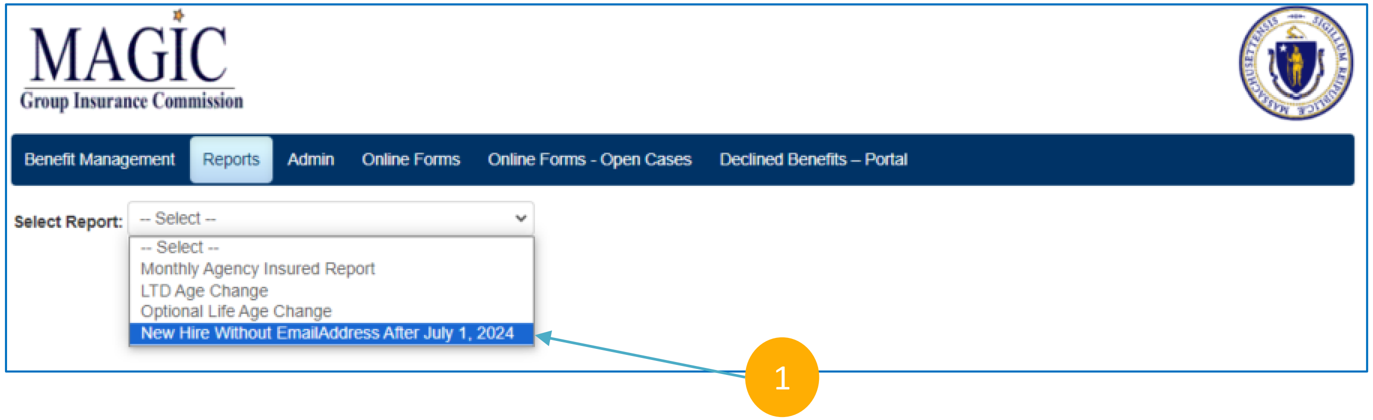
Missing Email Address Report in MAGIC (HR/CMS & UMass Agencies)

1. Click the **Dropdown** arrow.



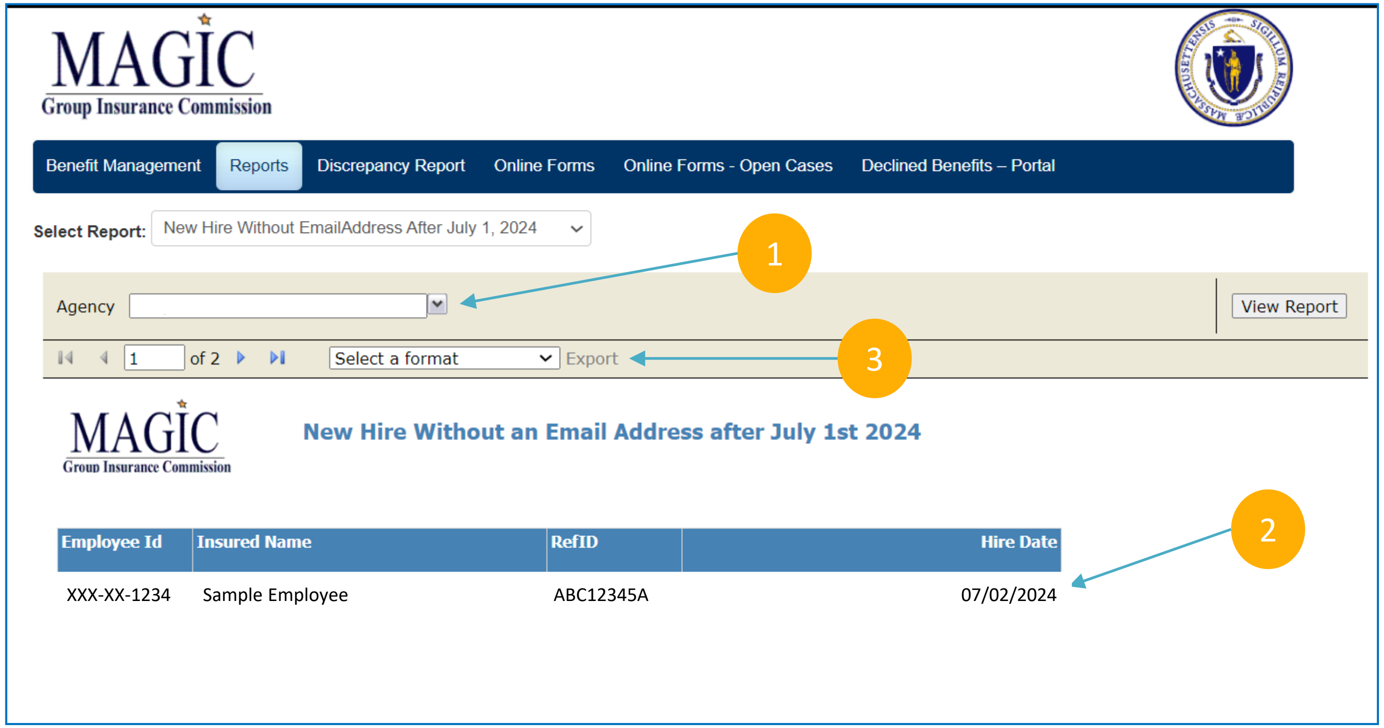
Missing Email Address Report in MAGIC (HR/CMS & UMass Agencies)

1. Click the **New Hire Without Email Address Report**.



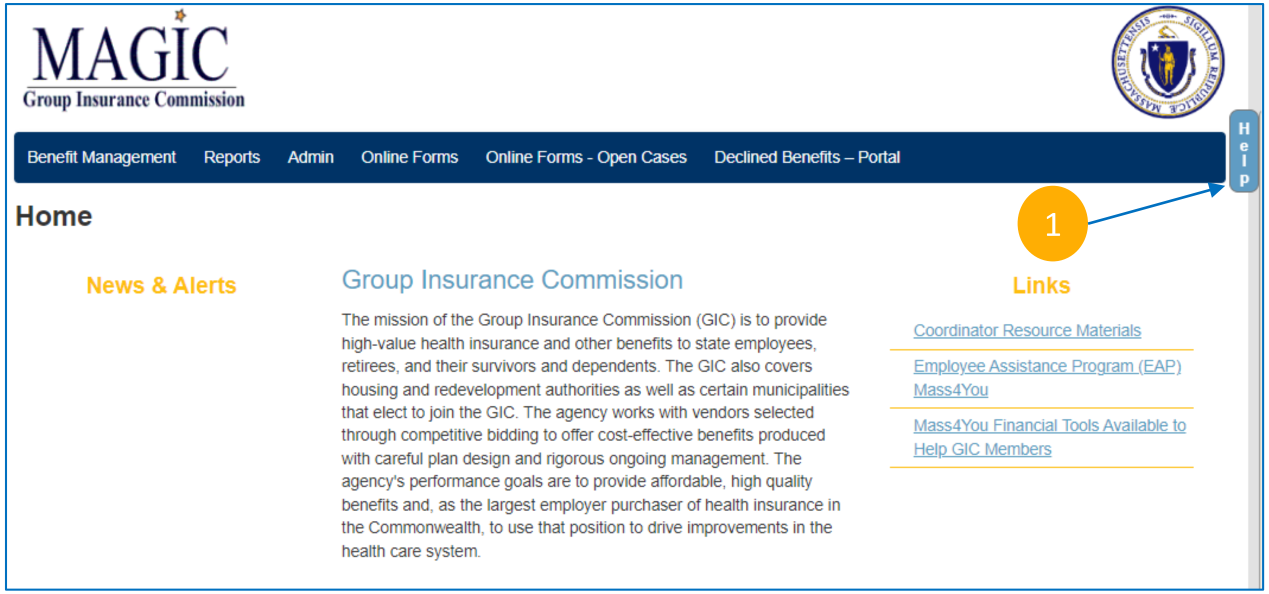
Missing Email Address Report in MAGIC (HR/CMS & UMass Agencies)

1. Select your **Agency**.
2. See detailed report below.
3. **Select a format** and click **Export** to save a copy.



Website Resources (HR/CMS & UMass Agencies)

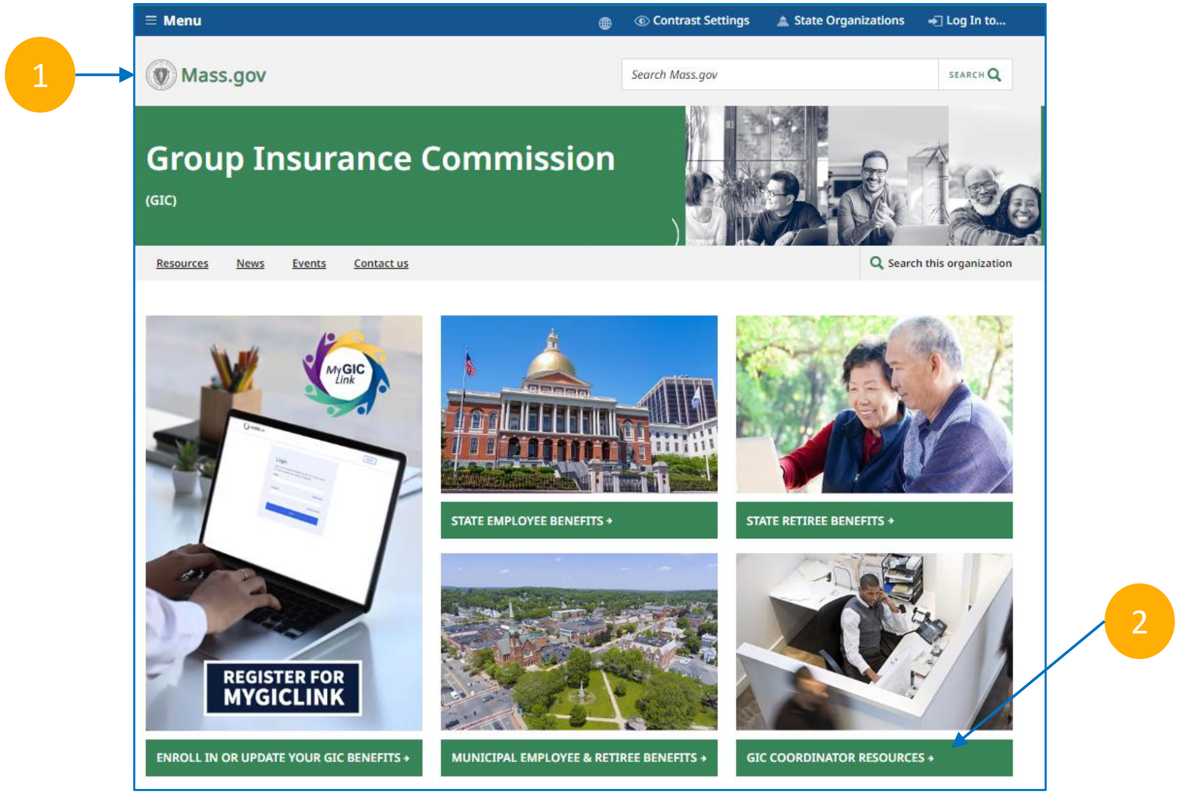
1. Additional new guides have been added to the MAGIC **Help Tab.**



Website Resources (HR/CMS & UMass Agencies)

1. Go to www.Mass.gov/GIC

2. Click **GIC Coordinator Resources.**

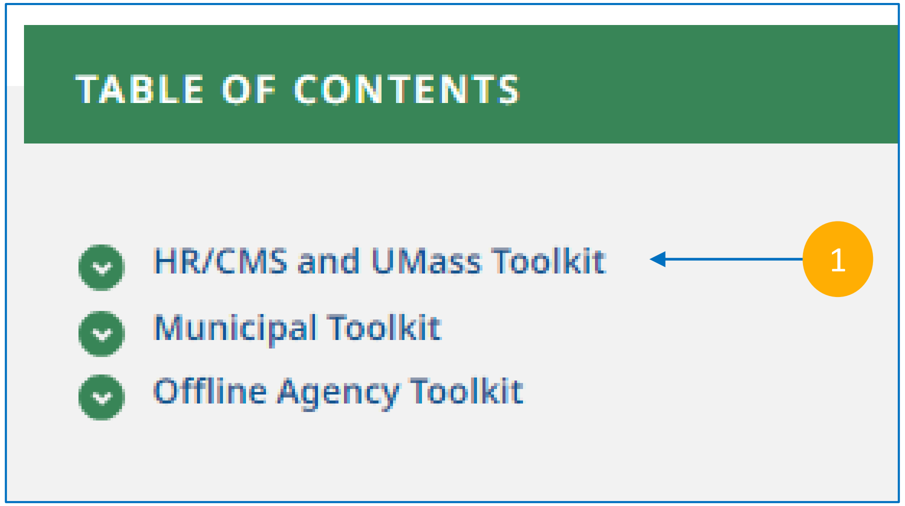


Website Resources (HR/CMS & UMass Agencies)

1. Click **MyGICLink Toolkit**

Website Resources (HR/CMS & UMass Agencies)

1. Click **HR/CMS and UMass Toolkit**



Website Resources
(HR/CMS & UMass Agencies)

1. Click the links to view samples.

2. Click the links to view video samples.

HR/CMS and UMass Toolkit

Documents

- MyGICLink: What You Need To Know
- Instructions for Updating an Employee's Email in MAGIC
- MyGICLink FAQ
- GIC Member Portal User Guide
- MyGICLink Member Registration Email Sample
- MyGICLink New Hire Registration Email Sample
- MyGICLink State Employee Acknowledgement Form
- Registration User Guide

1

Videos

- Welcome to the MyGICLink Member Benefits Portal
- MyGICLink Benefits Demo
- MyGICLink Dependents Demo
- MyGICLink Personal Information Demo
- MyGICLink Qualifying Events Demo
- MyGICLink Coordinator Training

2

Website Resources (HR/CMS & UMass Agencies)

1. Sample of the New Hire Registration email.

SAMPLE: myGICLink New Hire Registration Email

From: **My GIC Link** <mygiclinkcustomerservice@mass.gov>
Subject: Welcome to MyGICLink, Exceptional member benefits at your fingertips
To: johnsample@test.com

Hi John Sample,

As a new employee you have 21 days from your date of hire to enroll in GIC Benefits.Please log in to myGICLink Self Service Portal today to enroll.

Portal Link:
Email to register:

Your Pin Number is

Basic Life and Health - You may apply during the GIC's Annual Enroll... ...occurs every Spring for coverage effective July 1.

Optional Life or Long Term Disability - You may ap... ...subject to providing satisfactory Medical Evidence of Ins...

Dental/Vision - If you are eligible for ... ...you may apply during the GIC's Annual Enrollment which occurs ev... ...ctive July 1.

Important: Please use t... ...when accessing the GIC Member Portal: Google Ch...

Thank you for ... MyGICLi...

Group Insurance Commis...

Note: All enrollments processed through MyGICLink are subject to GIC's eligibility rules. If you have questions contact the GIC at 617-727-2310. ***Please do not reply or send documents to this automated email.***

Website Resources (HR/CMS & UMass Agencies)

1. Sample of the **State Employee Acknowledgement Form**.

Commonwealth of Massachusetts
Group Insurance Commission

State Employee Acknowledgement Form For GIC Benefits

You are responsible for reviewing your benefit options and making your GIC benefit elections within 21 days of the date of hire on the MyGICLink Member Benefits Portal:

- Basic Life Insurance
- Basic Life & Health Insurance
- Summary of Benefits and Coverage
- Optional Life Insurance
- Long Term Disability (LTD)
- Dental/Vision (if eligible)
- Health Care Spending Account (HCSA)*
- Dependent Care Assistance Program (DCAP)*
  - ** You must enroll in the Flexible Spending Account (FSA) benefit on the FSA administrator's website*

I understand that as a new hire I will receive a New Hire Welcome/Registration email from MyGICLinkcustomerservice@mass.gov and I must log in to the MyGICLink Member Benefits Portal to enroll in GIC benefits within 21 days of my date of hire. If I don't receive an email within 10 days of my hire date, I must notify the GIC Coordinator at my workplace so that enrollment forms can be provided to me via GIC Online Forms
By enrolling in GIC basic life or basic life and health insurance, my premiums will be deducted on a pretax basis unless I elect post tax benefits and if I enroll in a GIC health plan, I can't change my health plan until the next Annual Enrollment period. I understand that if I do not elect GIC Basic Life and health within 21 days of hire, my next opportunity to apply for these benefits is during GIC's next Annual Enrollment or within 60 days of a qualifying event.

Name: ______________________________
(Please print)

Signature: ___________________________________ Date:______________________

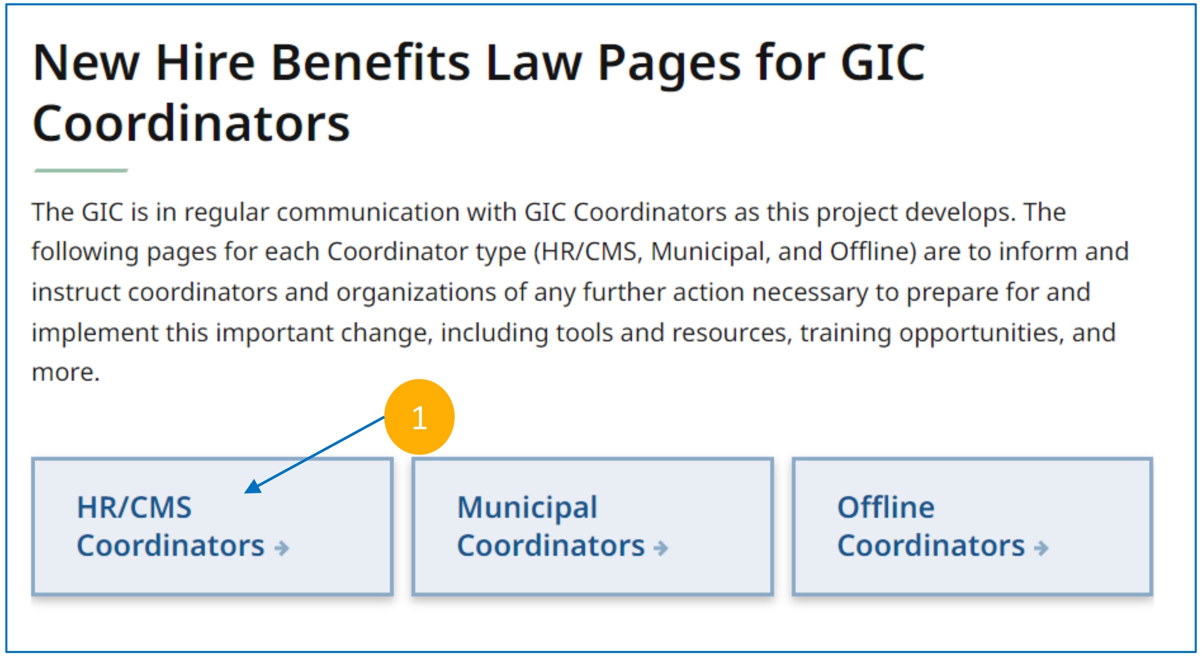
Employee: Return this signed form to your GIC Coordinator.
GIC Coordinator: Give employee a copy of this form and retain original signed form in employee's personnel file. Do not send to the GIC.

Website Resources (HR/CMS & UMass Agencies)

1. Click **New Hire Benefits Law Effective July 1,2024**

Website Resources (HR/CMS & UMass Agencies)

1. Click **HR/CMS Coordinators**
2. Detailed information for the Reduced Waiting Period Implementation can be found here

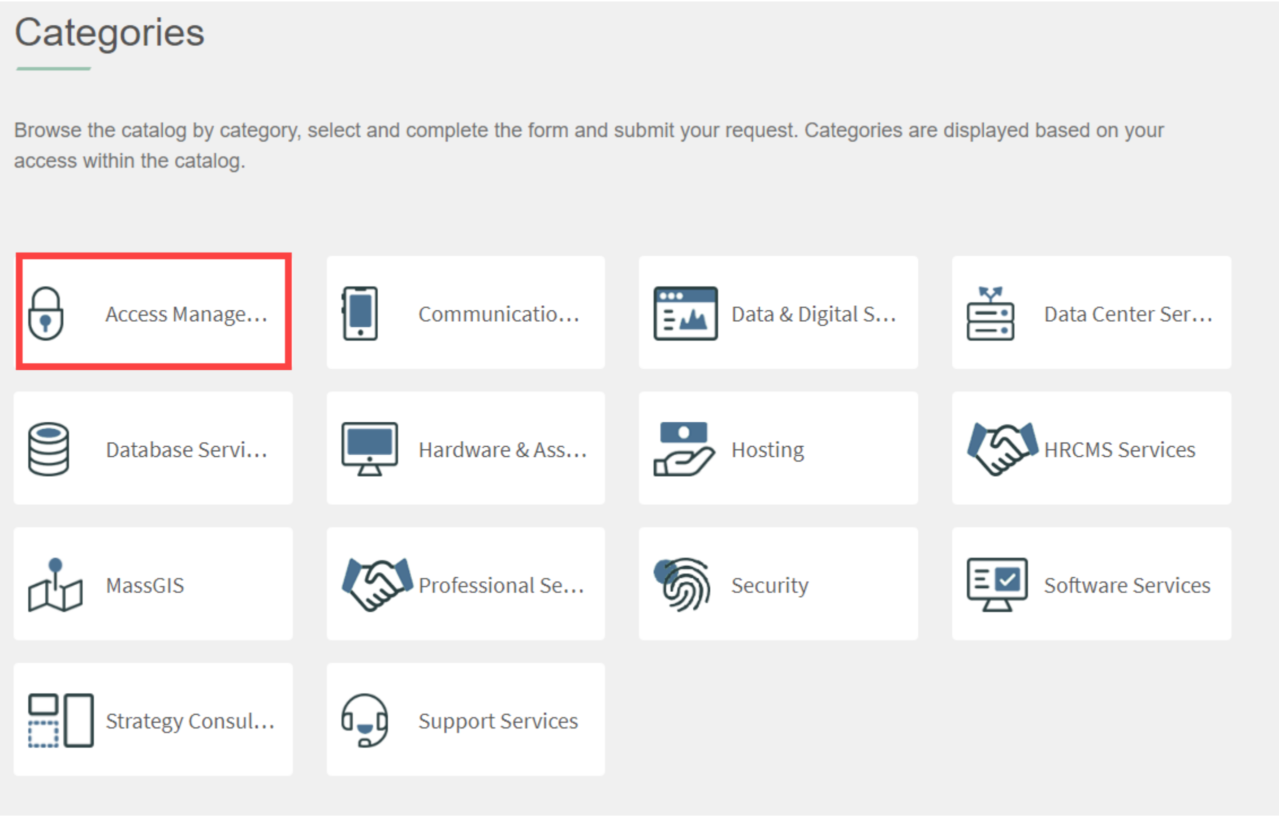


Security Requests

Evanice Henniger

Process Updates

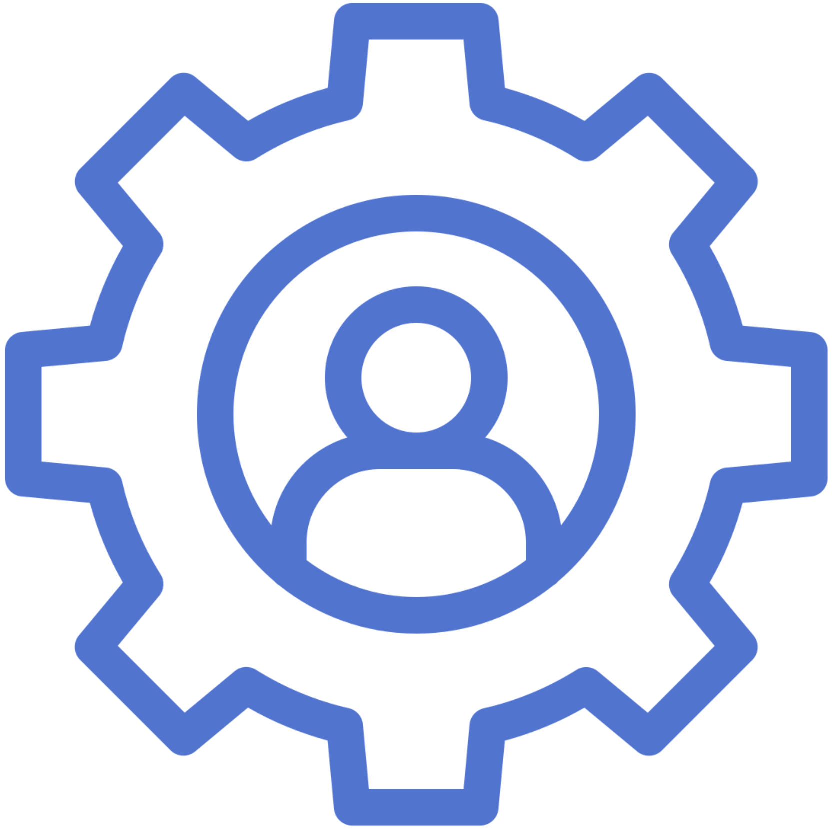
- ★ **Department Security Officer (DSO) must submit every request**
  - **New user requests**
  - **Changes to current access**
  - **Deleting users**
- ★ **Login to [ServiceNow]()**
  - **Select Access Management**
- ★ **Select Secure Application Request**



Security Guidelines

- ★ Mobius view has the security reports with each user listed and their current user access
- ★ Security Reports in Mobius:
  - SECMMARS (MMARS)
  - SECHRCMS (HR/CMS)
  - SECCIW (CIW)
- ★ HR/CMS Security Guidelines and Procedures Policy

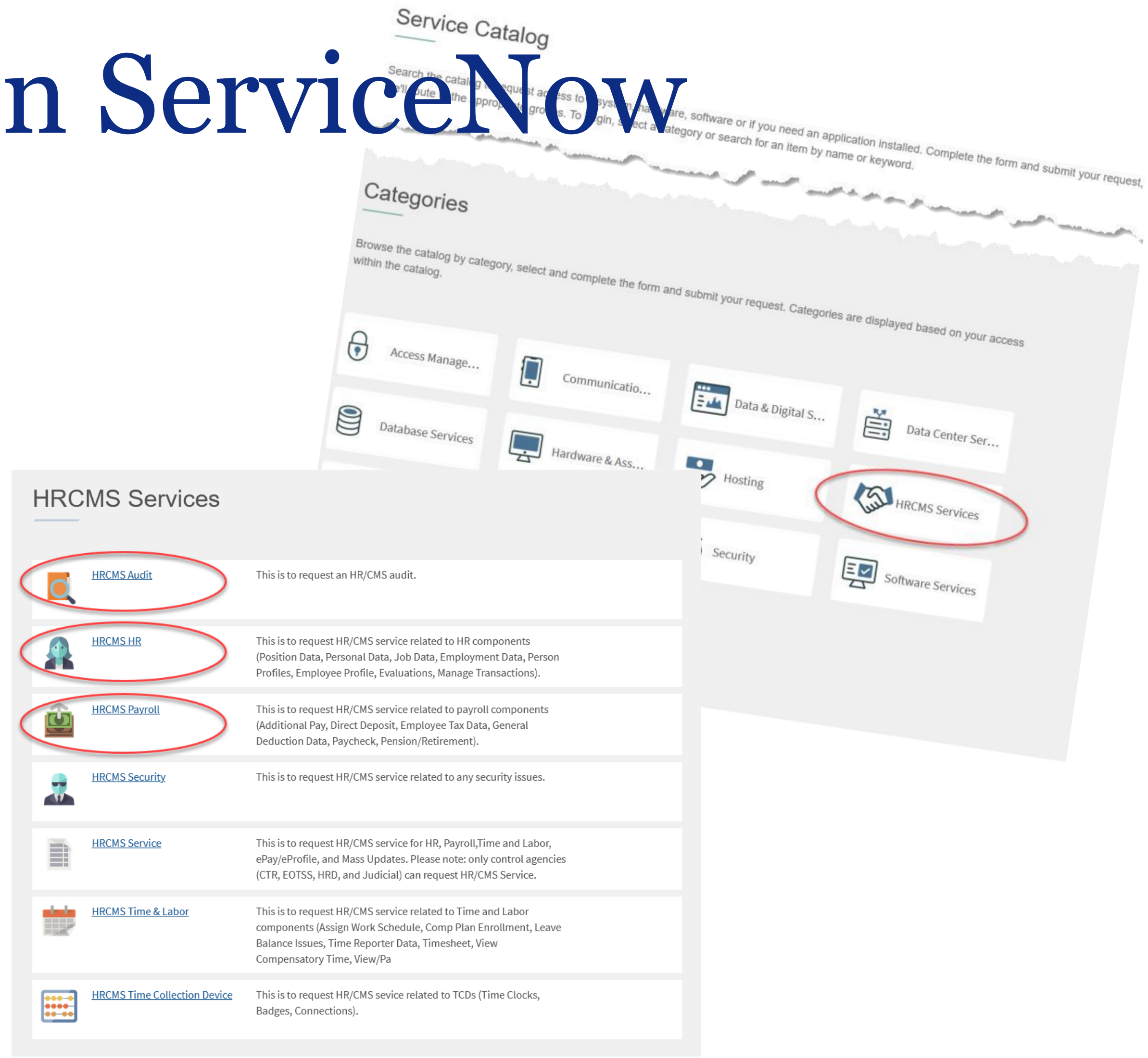
Communication & Support



- ★Tickets which are emailed to EOTSS ServiceNow can be misdirected
- ★Best Practice is to login to the portal and select the correct Service Catalog item
- ★Please include as much detail as possible in the ticket

How to log a ticket on ServiceNow

- ★ **Executive agencies should use the HRCMS HR catalog item**
- ★ **Independent/constitutional agencies should use the HRCMS Payroll catalog item**



HR/CMS User Group Meeting

Wednesday June 12th 2024

OFFICE OF THE COMPTROLLER
COMMONWEALTH OF MASSACHUSETTS

PLAN | INVEST | PROTECT

VOYA FINANCIAL

Agenda

- Commuter Choice Parking and Transit Overview
- Contact Information
- Important 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

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

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

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 immediately –forward the email to commonwealth@voya.com

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

Transit Process Calendar

TRANSIT ELECTION CHANGE PROCESS CALENDAR FY2025 07/01/24-06/30/25

Benefit Month	Requests Received by Voya	Payroll Process Date	Paycheck Date	Funds Credited To Debit Card
July 2024	Weds. 05/29/24	06/04/24	06/07/24	06/20/24
August 2024	Weds. 07/10/24	07/16/24	07/19/24	07/20/24
September 2024	Weds. 08/07/24	08/13/24	08/16/24	08/20/24
October 2024	Weds. 09/04/24	09/10/24	09/13/24	09/20/24
November 2024	Weds. 10/02/24	10/08/24	10/11/24	10/20/24
December 2024	Weds. 10/30/24	11/05/24	11/08/24	11/20/24
January 2025	Weds. 12/11/24	12/17/24	12/20/24	12/20/24
February 2025	Weds. 01/08/25	01/14/25	01/17/25	01/20/25
March 2025	Weds. 02/05/25	02/11/25	02/14/25	02/20/25
April 2025	Weds. 03/05/25	03/11/25	03/14/25	03/20/25
May 2025	Weds. 04/02/25	04/08/25	04/11/25	04/20/25
June 2025	Weds. 04/30/25	05/06/25	05/09/25	05/20/25

Parking Process Calendar

PARKING ELECTION CHANGE PROCESS CALENDAR FY2025 07/01/24-06/30/25

Benefit Month	Requests Received by Voya	Payroll Process Date	Payroll check Date	Funds Credited To Debit Card
July 2024	Weds. 06/12/24	06/18/24	06/21/24*	06/20/24
August 2024	Weds. 07/24/24	07/30/24	08/02/24*	07/20/24
September 2024	Weds. 08/21/24	08/27/24	08/30/24*	08/20/24
October 2024	Weds. 09/18/24	09/24/24	09/27/24*	09/20/24
November 2024	Weds. 10/16/24	10/22/24	10/25/24*	10/20/24
December 2024	Weds. 11/13/24	11/19/24	11/22/24*	11/20/24
January 2025	Weds. 12/25/24	12/31/24	01/03/25*	12/20/24
February 2025	Weds. 01/22/25	01/28/25	01/31/25*	01/20/25
March 2025	Weds. 02/19/25	02/25/25	02/28/25*	02/20/25
April 2025	Weds. 03/19/25	03/25/25	03/28/25*	03/20/25
May 2025	Weds. 04/16/25	04/22/25	04/25/25*	04/20/25
June 2025	Weds. 05/14/25	05/20/25	05/23/25*	05/20/25

Commuter Reminders – Agreements

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.

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.

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!

Fiscal Year End

Scott Claussen

Statewide Payroll Officer

Close/Open Resources

★ **The Close/Open resource page includes:**

- The Close/Open calendar
- Latest announcements
- On-demand sessions from Close/Open week 2024-2025
- Close/Open Boot camps

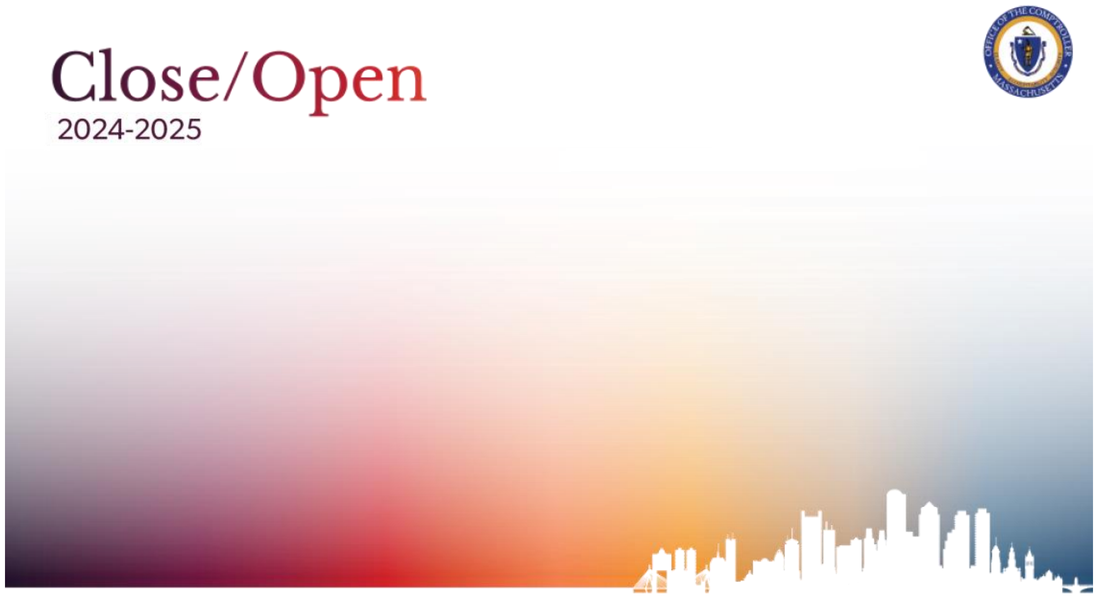


Chart of Account Changes

- ★ **By today you should have:**
  - Identified FY2025 COA changes, e.g., program codes or appropriation changes
  - Prepared for any potential appropriation changes (budget is not finalized, still in conference if there are any changes)
  - Planned for any position transfer and LCM distributions for FY25
  - Started to enter PH documents for Accounts Payable
- ★ **Do not over encumber!!**

Key Dates

- ★ For PPE June 29 – Last full payroll of FY2024
  - June 28 – Last day for HR & Garnishment transaction in HR/CMS
  - July 1 – Last day for posting Time & Attendance
  - July 2 – Last day for making Labor Distribution changes in LCM
- ★ Finalize all Payroll Hold activity for AP by June 30
- ★ PPE July 13 – Payroll is prorated by business days of the pay period (Mon-Fri) there are 10 business days in FY2025

Split Year Earnings

- ★ Sick, Vacation and Comp Buyouts entered as amounts will post to 7/1, and therefore, FY2025 (SBA, VLA, CBA)
- ★ Sick, Vacation and Comp Buyouts entered as hours will post to 6/30 and therefore, FY2024 (SBB, VIL, CBB)
- ★ Prior Period Adjustments should be entered in Timesheet on a date before 6/29/2024
- ★ Use of a ComboCode with time posted on or after July 1 will post labor charges to FY2025

HR/CMS Account Code Roll

- ★ **Now available (new report every Friday in June)**
- ★ **HMMARS3 Report identifies:**
  - **All positions assigned to invalid accounts**
  - **If incumbent exists, then EmplID and Rec # are shown**
- ★ **Agencies must take corrective action before 6/30/2024**
- ★ **Failure to act will result in positions being automatically updated on July 18**
- ★ **Invalid codes will be updated with the FIRST valid account code within your department**

Mass Termination of Contract Jobs

- Non-Higher Education agencies will occur on July 18
- Higher Education agencies will not occur until the Fall
- Includes all Active contractors hired before and unpaid since October 1, 2022
- Departments will be notified
- Mobius report is HMPCS004 – Termination of Contract Jobs

Payroll Receipt Vouchers

- ★ Please send to Comptroller's team first – PRRV@mass.gov
- ★ All vouchers for any pay periods should be submitted ASAP
- ★ Cash cutoff for PRRVs is June 30 with the deadline for submission being Friday June 28

LCM Rules Roll – POAA Rules

- ★ **All current rules will expire on June 30**
- ★ **Draft rules for FY2025 are available as of 05/31/2024**
- ★ **Departments should review draft rules and delete any rules that will not apply to FY2025**
- ★ **Departments must include full justification for rule as a comment and submit for approval**
  - **Departments do not need to email paperwork to Statewide Payroll Team**
  - **Rules request form is no longer used**
  - **Departments should retain a signed copy of rules on file**
- ★ **New Rules for FY2025 must have a From date of 7/1/2024 and To date of 12/31/9999**

POAA continued

- ★ **Document IDs for draft rules are defined as follows:**
  - **Department ID**
  - **Assigned Appropriation or ALL if the rule applies to all Appropriations**
  - **C24 (to indicate that it is a Create rule generated in 2024)**
  - **Unique number**
- ★ **Departments can enter *C24* as the Document ID search criteria to find all draft POAA rules**

PALT, DEACC and Others

- ★ **PALT Rules – Rules are specific to FY; departments must reapply for all PALT rules**
- ★ **DEACC – Please contact Statewide Payroll Team to request removal of rules that no longer apply for FY2025**
- ★ **PCREQ/DEPTEs/EDPRs/LDPRs – Will continue in effect for FY2025; departments should review and make any changes needed**

Boot Camp – Closing/Opening Dynacash

Join the Payments team on Thursday, June 13th @10am

Recording will be posted to CTR LMS

Reminder to reconcile your Dynacash!

Get your outstanding dyna buybacks in today

Accounts Payable

Scott Claussen

Statewide Payroll Officer

Accounts Payable Period

- ★ **Pay periods ending: 7/27, 8/10, and 8/24**
- ★ **Two ways to charge FY2024:**
  - **Enter prior period adjustment in timesheet for date prior to June 30**
  - **Use an Accounts Payable earning code in Additional Pay (see CTR memo for list of AP Earning Codes)**

Payroll Holds

- ★ Are required for all charges – even negative and net zero – during Accounts Payable
- ★ After June 30, 2024, Payroll Holds will be added to the list of transactions requiring A&F approval for submissions or alterations in excess of $50,000
- ★ Make sure you have enough money to cover FY2024 charges through Split Year before you encumber money in a PH
- ★ Are NOT required for Split Year or DD level encumbrances

PRLDE & PRLIF Cleanup

- ★ **State Finance Law requires that accounts are funded before expenditures are made**
- ★ **All State Accounts must be balance before the end of AP period**

Deficiency Payroll

- ★ If you do not get all payments entered before 8/23/2024, any prior fiscal year payments will have to be processed as deficiencies
- ★ Payroll Deficiencies are processed through the Prior Year Deficiency (PYD) Process. They are submitted to Statewide Payments team for review. Once approved, CTR will provide the deficiency codes and recoup the funding from the department.
- ★ Department uses deficiency earning codes as directed by Statewide Payroll Team to process charges in HR/CMS
- ★ Payroll Accounting Team will handle the distribution in LCM


TASC
Commonwealth of Massachusetts
Group Insurance Commission
HR/CMS User Group Meeting
June 13, 2024

Overall Refresher of the FSA/Dependent Care Benefit

- TASC administers the FSA Healthcare and Dependent Care
- Plan runs on a Fiscal Year July 1-June 30th.
- Grace Period through 9/15 each plan year, and Runout Period through 10/15 each plan year.
- For the FY25, FSA Healthcare maximum is 3200 and Dependent Care maximum is 5000.
- Participants do receive a TASC debit card that they can use to pay for eligible expenses. Participants can request additional cards for spouse/dependent at no charge.

Overall Refresher of the FSA/Dependent Care Benefit

- Participants must re-enroll each plan year during open enrollment period. To enroll mid plan year, the participant must have a Qualifying Life Event or elect as a new hire within their first 21 days of hire.
- All enrollments should be submitted through www.massfsatasc.com.
- Also on the massfsatasc.com site are Resources for GIC Coordinators and participants. This includes Plan information such as Participant handbook, List of Eligible Expenses, Reimbursement forms, enrollment forms, change forms, etc.

Overall Refresher of the FSA/Dependent Care Benefit

- Under Resources, you will find the Change Form (paper or web-based) The change form is required to be completed to report terminations, Reclassifications/transfers from one Agency to another, election changes due to a Qualified Life Event, and Beginning and Ending of Leave of Absence (LOA).
- Once a change form is submitted, it routes to our Premium Service Team, who processes the request, and then corresponds back to the Coordinator.
- Amanda Odom is the Relationship Manager and your direct TASC contact. Amanda.Odom@tasconline.com, 800-422-4661, ext 7908. This is for Agency Coordinators only.

Process for Leave of Absence (LOA)

Reporting LOA to TASC

Participant Leaves of Absence should be reported at the beginning and ending of the LOA period. LOA can be reported to TASC via **change form** by the employee or the Coordinator. If reported by the employee, TASC Premium Services will email the Coordinator to inform and confirm.

Types of LOA Options

1. LOA Paid
2. LOA – Unpaid
   - Prepay contributions
   - Payment of missed deductions upon return
   - Direct bill payment while on LOA

LOA - Paid

- **Healthcare FSA:** Deductions will continue to be taken from your pay each pay period and your coverage will continue uninterrupted. Expenses can be incurred before, during, or after the LOA.
- **Dependent Care:** Deductions can continue to be taken if you think you will have enough incurred expenses while you are actively working. Expenses can only be incurred before or after the LOA. No expenses may be reimbursed that were incurred while on the LOA. If you choose to stop your Dependent Care deductions, see the Returning from an Unpaid

LOA – Unpaid

<u>Prepay contributions</u>

- Participant has a lump sum pre-tax deduction withheld prior to their LOA This will cover the period of time that no payroll deductions are being taken. TASC Card will remain active and participant may continue using funds and submitting claims through the prepaid time period.
- DCAP participants should stop their deductions while on LOA as they are not eligible to incur expenses while on LOA.

LOA - Unpaid

Pay Upon Return

- Participants can elect to make up missed deductions on a pre-tax basis once they return from LOA. Once missed deductions are paid, coverage would be back dated to the LOA start date, so participant can at that this time claim healthcare expenses that were incurred during their LOA period. TASC card is not active during LOA, but reactivated upon return.
- DCAP participants should stop their deductions while on LOA as they are not eligible to incur expenses while on LOA.

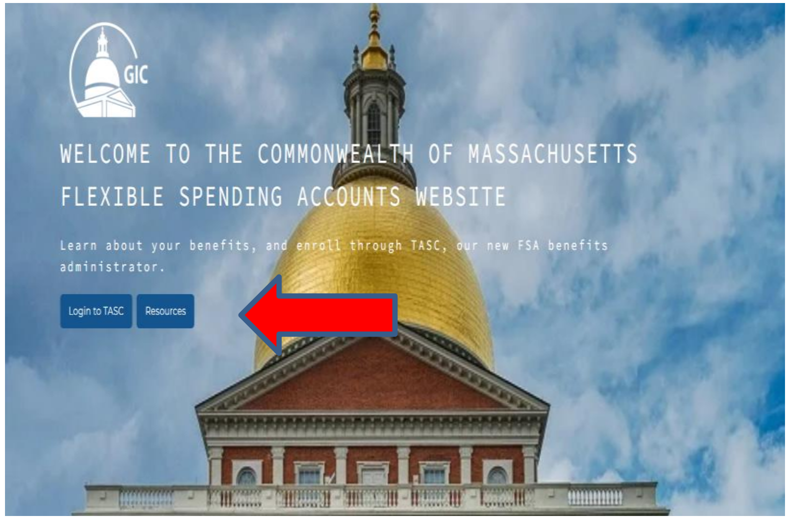
LOA - Unpaid

Direct Bill (not pretax)

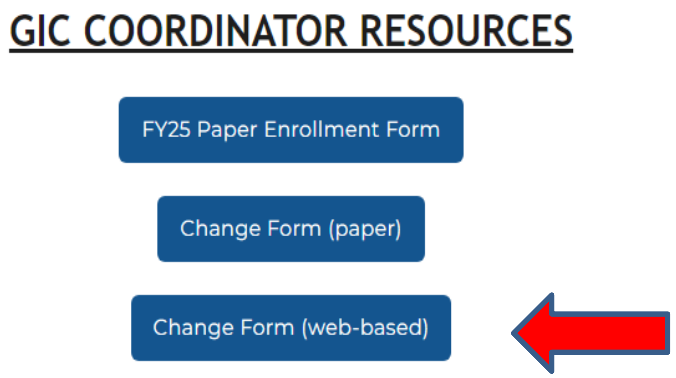
- Participants can elect to be directly billed for FSA premiums and monthly admin fee while on LOA. This must be requested before the beginning of the unpaid leave. TASC will invoice the participant at the beginning of each month and payment must be received by the due date on the invoice.
- DCAP - Since direct bill is on an after-tax basis, there is no benefit for participants to continue dep care deductions directly while on the LOA.

How to submit a change form to report LOA to TASC?

Step 1: Go to www.massfsatasc.com, and click on Resources



Step 2: Select "Change Form (web-based)"



Step 3: This is what the web-based change form looks like. You will enter in all of the requested demographic information for the LOA participant. Then, beginning with #16, you will enter the LOA information in and submit. This form routes to TASC premium services who processes the LOA entry.

HCSA/DCA CHANGE FORM

COMPLETED BY THE GIC COORDINATOR ON BEHALF OF THE EMPLOYEE

Complete and submit this form for the following events. Employee or GIC Coordinator may complete/submit for all events, except 6) below (Coordinator Only)

1. Currently enrolled employees who have a qualifying life event and wish to adjust their elections or election amounts (add, drop, change) may do so by completing the form.
2. Employees not currently enrolled, but have had a qualifying life event which makes them eligible to enroll may do so by completing the form. NOTE: If you are enrolling for the first time due to a qualifying life event, you MUST also complete and submit the enrollment form found at massfsatasc.com
3. You are starting or ending a Leave of Absence (LOA)
4. You are submitting a reclassification request, where you are transferring from one agency to another agency
5. You are requesting a payroll refund, due to a payroll deduction error
6. Termination of employment (Coordinator Only)

To be completed and submitted by GIC Coordinator
(on behalf of employee)

1. EMPLOYEE FIRST NAME*


TASC
Questions?

Resources & References

Reference Resources

★ **PowerDMS**

- Medicare Tax
- Determining Medicare Tax Status

★ **Students and Employment | USCIS**

★ **Wage Law Act**

★ **Non-Resident Alien Tax Treaty**

★ **Managing Citizenship, Visa & Non-Resident Alien Taxation Reference Guide**

Support Resources

★ **EOTSS ServiceNow**

- https://massgov.service-now.com
- Should be used for HR/CMS issues

★ **CTR Solution Desk**

- https://www.macomptroller.org/solution-desk/
- Should be used for LCM or MMARS issues

★ https://public.powerdms.com/MAComptroller/documents/2269012

Thank you

Next meeting September 11, 2024