

HR/CMS User Group Meeting

March 11, 2026



OFFICE OF THE COMPTROLLER
COMMONWEALTH OF MASSACHUSETTS



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Thank you!**

Welcome

- ★ Chat function is disabled
- ★ Use Q&A to type in questions
- ★ Mute function is enabled
- ★ Closed Captioning is on
- ★ Recorded

Agenda

- I. Welcome – William McNamara, Comptroller**
- II. GIC**
- III. BEST**
- IV. VOYA**
- V. Trending Topics**
- VI. Empower Retirement – SMART Plan**
- VII. Tips & Tricks**
- VIII. Metro Credit Union**
- IX. TASC – HCSA/DCAP**
- X. Resources & References**

Opening Remarks

Comptroller William McNamara



HR/CMS Core Users

March 11, 2026

 [Mass.gov/GIC](https://www.mass.gov/GIC)

 [@MassGIC](https://twitter.com/MassGIC)

 [MA Group Insurance Commission](https://www.youtube.com/MAGroupInsuranceCommission)

 [Group Insurance Commission](https://www.linkedin.com/company/group-insurance-commission)

Business Enterprise Systems Transformation



BEST Program Update

HR/CMS User Group

March 11, 2026



Commonwealth of Massachusetts

Confidential: for internal discussion and policy development only

Topics

- ▶ Phase 2 Approach: *Awareness, Engage, Collect Information & Analyze*
- ▶ Agency or Cohort-Level Meetings By Functional Area
- ▶ Functional-Specific Listening Sessions
- ▶ Continued Collaboration
- ▶ How to Engage
- ▶ Phase 2 PMO and Functional Lead Team
- ▶ Thank you!



Phase 2 Approach: Awareness, Engage, Collect Information & Analyze

- 1 Presented **Phase 2 "Approach and Overview"** to various agencies, HR/Payroll User Groups and other convenings
- 2 Refresh and ongoing collection of **Point-of-Contact (POC) for Phase 2** and, by agency, **solution function specific Subject Matter Experts**
- 3 Collected agency experiences; challenge, areas of opportunity & improvement, use of third party or in-house solutions by agency, via **Functional-Specific User Experience Surveys** sent to all POCs and solution function Subject Matter Experts.
- 4 Conducting a series of **"baselining" sessions with agencies** as follow-up on findings from Phase 2 User Experience Functional Surveys AND **Functional Specific Listening Sessions**
- 5 Bringing it all together for **"understandings-to-date" compendium** based on all the information collected and analyzed across all data sources (i.e., CBA analysis, HR/CMS internal workings, survey, baselining sessions, etc.) to provide the vendor upon contract execution.



Business Enterprise Systems Transformation

Agency or Cohort-Level Meetings By Functional Area

- ▶ Conducting targeted meetings with agencies and functional cohorts to deepen understanding of current workflows, systems, and operational challenges.
- ▶ Validating findings from user experience surveys and baseline sessions through direct engagement with subject matter experts.
- ▶ Further identifying agency-specific processes, third-party solutions, and unique operational requirements that may impact solution design.
- ▶ Gathering detailed input on pain points, manual workarounds, reporting needs, and desired system capabilities.
- ▶ Compiling collected information in a thoughtful and organized manner for vendor staff once contracting is completed
- ▶ Will inform business process assessment (BPA) activities and support the development of future enterprise solution design.



Functional-Specific Listening Sessions

PURPOSE



- Engage partner agencies in BEST Phase 2 as a collective under a functional umbrella
- Share status, progress and ASB update
- Deepen understanding of shared Payroll & HCM needs, opportunities, and current challenges
- Gather cross-agency input as we strive for a standardized enterprise model

GOALS



- Sustain engagement and build Phase 2 momentum
- Strengthen collaboration and readiness toward BPA
- Review key User Experience Survey findings
- Identify shared challenges and priority opportunities

STRUCTURE



- Planned with BEST Comms, HRD & Comptroller business owners
- 3 sessions per functional area (Exec & Non-Exec) – limited to 25 attendees
- February 18 – End of March
- 18 total listening sessions



Continued Collaboration

- ▶ Hosting these Functional Listening sessions to ensure we create opportunities for all voices to be heard (through the end of March)
- ▶ Conducting agency-specific "baselining" meetings to talk in more detail, about specific agency needs and opportunities
- ▶ Continuing to Review and Analyze CBAs (and follow-up with agencies, as needed).
- ▶ Continuing to collecting agency documents including handbooks, workflows, process documents, 3rd party contracts, etc.
- ▶ Continuing to collect and refine Phase 2 Points-of-Contact and Functional Specific SMEs by agency



Looking to engage with Phase 2 team?



Reach out to functional area leads with questions specific to Payroll, Personnel Administration, Talent Acquisition & Onboarding, Learning, Time & Attendance.

We want to meet with you! Lead names and email addresses on Functional Lead Team slide.

How will the Phase 2 team next engage with you?



The BEST Phase 2 team will continue to reach out to schedule meetings with agencies to learn about unique user needs.

Business Enterprise Systems Transformation

Phase 2 PMO and Functional Lead Team

BEST Program Management Office
Transformation_PMO@mass.gov
best.macomptroller.org

Helen O'Malley
BEST Program Manager
Helen.OMalley@mass.gov



Michael Kelleher
Phase 2 Project Manager
Michael.Kelleher6@mass.gov



Kerrie Coleman
Phase 2 Procurement Lead
Kerrie.Coleman@mass.gov



**Payroll, Time and Attendance,
Personnel Administration**

Sam Moy
Time and Attendance Functional
Lead
sam.moy@mass.gov



Robin Anastasio
Payroll Functional Lead
Robin.Anastasio1@mass.gov



Tsui Cheng
Personnel Administration Team
Lead
Tsui.Cheng@mass.gov



**Human Capital Management
(HCM)**

Bill Weiss
HCM Functional Lead
Bill.J.Weiss@mass.gov



Dan Miguel
Talent Acquisition & Onboarding
Lead
Daniel.Miguel@mass.gov



Denise Martin
Learning Management Lead
Denise.Martin@mass.gov



Phase 2 Business Analysts

Tim Owens
Time & Attendance
Business Analyst
Timothy.Owens@mass.gov



Robert Dionne
HR Generalist
Business Analyst
Robert.Dionne1@mass.gov



Pamela DiGirolamo
Collective Bargaining Agreement
Analyst
Pamela.DiGirolamo@mass.gov



Christian Carde Guzman
HR Generalist
Business Analyst
Christian.Carde@mass.gov



Megan Joyce
HR Generalist
Business Analyst
Megan.Joyce@mass.gov



Divya Nama Alexander
HR Generalist
Business Analyst
Divya.Alexander@mass.gov



Business Enterprise Systems Transformation

Thank you!



Payroll User Group Meeting

March 2026

OFFICE OF THE COMPTROLLER
COMMONWEALTH OF MASSACHUSETTS

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
- Contact Information
- Important Reminders
- New Commuter Form

Commonwealth Commuter Programs

Commonwealth of Massachusetts

Transit and Parking Reimbursement Accounts, Commonwealth of Massachusetts Employees

Voya Financial 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 Voya Financial, which can be accessed by clicking the Election Change button below.

QTBP PARTICIPANT LOGIN

ELECTION CHANGE

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](#)
- [FY2024 Transit Election Change Process Calendar](#)
- [FY2024 Parking Election Change Process Calendar](#)
- [FY2025 Transit Election Change Process Calendar](#)
- [FY2025 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@voya.com
- Fax to: 603-232-8079

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 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 FY2026 07/01/25-06/30/26

Benefit Month	Requests Received by Voya	Payroll Process Date	Paycheck Date	Funds Credited To Debit Card
July 2025	Weds. 06/11/2025	06/17/2025	06/20/2025	06/20/2025
August 2025	Weds. 07/09/2025	07/15/2025	07/18/2025	07/20/2025
September 2025	Weds. 08/06/2025	08/12/2025	08/15/2025	08/20/2025
October 2025	Weds. 09/03/2025	09/09/2025	09/12/2025	09/20/2025
November 2025	Weds. 10/01/2025	10/07/2025	10/10/2025	10/20/2025
December 2025	Weds. 10/29/2025	11/04/2025	11/07/2025	11/20/2025
January 2026	Weds. 12/10/2025	12/16/2025	12/19/2025	12/20/2025
February 2026	Weds. 01/07/2026	01/13/2026	01/16/2026	01/20/2026
March 2026	Weds. 02/04/2026	02/10/2026	02/13/2026	02/20/2026
April 2026	Weds. 03/04/2026	03/10/2026	03/13/2026	03/20/2026
May 2026	Weds. 04/01/2026	04/07/2026	04/10/2026	04/20/2026
June 2026	Weds. 04/29/2026	05/05/2026	05/08/2026	05/20/2026

Parking Process Calendar

PARKING ELECTION CHANGE PROCESS CALENDAR FY2026 07/01/25-06/30/26

Benefit Month	Requests Received by Voya	Payroll Process Date	Paycheck Date	Funds Credited To Debit Card
July 2025	Weds. 06/25/2025	07/01/2025	07/03/2025*	06/20/2025
August 2025	Weds. 07/23/2025	07/29/2025	08/01/2025*	07/20/2025
September 2025	Weds. 08/20/2025	08/26/2025	08/29/2025*	08/20/2025
October 2025	Weds. 09/17/2025	09/23/2025	09/26/2025*	09/20/2025
November 2025	Weds. 10/15/2025	10/21/2025	10/24/2025*	10/20/2025
December 2025	Weds. 11/12/2025	11/18/2025	11/21/2025*	11/20/2025
January 2026	Weds. 12/24/2025	12/30/2025	01/02/2026*	12/20/2025
February 2026	Weds. 01/21/2026	01/27/2026	01/30/2026*	01/20/2026
March 2026	Weds. 02/18/2026	02/24/2026	02/27/2026*	02/20/2026
April 2026	Weds. 03/18/2026	03/24/2026	03/27/2026*	03/20/2026
May 2026	Weds. 04/15/2026	04/21/2026	04/24/2026*	04/20/2026
June 2026	Weds. 05/13/2026	05/19/2026	05/22/2026*	05/20/2026

New Form Section 1

- We are updating our forms to an editable PDF. Nothing has changed with the process only the look of the form.

QUALIFIED TRANSPORTATION BENEFIT PLAN TRANSIT AND PARKING ELECTION FORM

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

Voya Benefits Company, LLC

A member of the Voya® family of companies

Health Account Solutions: PO Box 1168, Minneapolis, MN 55440

Phone: 833-232-4673; Fax: 855-370-0670; Email: HASInfo@voya.com



Health Account Solutions, including Health Savings Accounts, Flexible Spending Accounts, Commuter Benefits, Health Reimbursement Arrangements, and COBRA Administration offered by Voya Benefits Company, LLC (in New York, doing business as Voya BC, LLC), HSA custodial services provided by Voya Institutional Trust Company.

*Offline (999) agencies are not eligible for this benefit plan.

SECTION 1. EMPLOYEE INFORMATION

Department Code _____

Name (First) _____ (Last) _____ Employee ID¹ _____

Birth Date (mm/dd/yyyy) _____ Social Security Number (SSN) _____ Today's Date _____

Home Mailing Address _____ City _____ State _____ Zip Code _____

Phone Number _____ Email² (Required) _____

¹ Check your paystub for your Employee ID#

² A valid email address is required to remain on your account for the duration of your enrollment into the plan, or as long as you carry an available balance. Voya will email you every month with a reminder to check your balance.

New Form Section 2 Transit

SECTION 2. TRANSIT BENEFIT ELECTIONS

I elect to have the following amount of money reduced from my salary before taxes to reimburse me for eligible Mass Transit expenses I incur during the plan year. Please enter the amount below that you would like to elect per month - If you wish to cease your contribution, please enter 0.00, and select the benefit month that election change will take effect from the dropdown.

Transit Amount Per Month ¹	Benefits/Expense Month and Year (<i>Benefit Month for Dollar amount entered must be chosen. For deadlines related to monthly changes, go to https://presents.voya.com/Content/Delivers/commonwealth/</i>)
\$	

Note: IRS Max as of Jan 1, 2026 is \$340 However The Commonwealth of MA will not increase to the Federal exclusion of \$340. But rather only increase by the \$10 as noted below. IRS exclusion qualified transit and parking amounts 2026 - \$335

I understand the following terms of the Mass Transit Benefit:

1. This monthly election will stay in place at the above rate until you elect to have it changed.
2. The cost of any pass, token, fare card, voucher, or other item that entitles the employee to use **Mass Transit** for purpose of traveling to or from his/her place of work are considered eligible to use your Voya debit card to purchase.
3. **Mass Transit** may be via:
 - A mass transportation system
 - A private **Mass Transit** enterprise conducted by a company or individual that is in the business of transporting people in a "commuter highway vehicle." Such a vehicle must have a seating capacity for six or more adults (not including the driver), and at least 80 percent of the vehicle's mileage must be from transporting employees to and from their place of work. Additionally, the vehicle must be used by a minimum of three commuters (not including the driver). The vehicle may be owned or leased by an employer for use by employees or a third-party provider. Employees can also own and operate commuter highway vehicles.
 - Voya has also approved UberPool & Lyft as authorized merchants for which you can utilize funds from your commuter Transit account for eligible expense **to-and-from work**. Your current flex Visa card will not work with UberPool or Lyft mobile app as a method of payment – you will need to pay for your ride(s) using your own personal credit card, and then submit a Commuter Choice Claim Form to be reimbursed by Voya from your available transit account balance. You can find the Claim Form [here](#).

New Form Section 3 Parking

SECTION 3. PARKING EXPENSE ACCOUNT ELECTIONS

- I elect to have the following amount of money reduced from my salary before taxes to reimburse me for eligible Parking expenses I incur during the plan year. Please enter the amount below that you would like to elect per month - If you wish to cease your contribution, please enter 0.00, and select the benefit month that election change will take effect from the dropdown.

Parking Amount Per Month ¹	Parking/Expense Month and Year (<i>Benefit Month for Dollar amount entered must be chosen. For deadlines related to monthly changes, go to https://presents.voya.com/Content/Delivers/commonwealth/</i>)
\$	

Note: IRS Max as of Jan 1, 2026 is \$340 However The Commonwealth of MA will not increase to the Federal exclusion of \$340. But rather only increase by the \$10 as noted below. IRS exclusion qualified transit and parking amounts 2026 - \$335

I understand the following terms of the Parking Benefit:

1. This monthly election will stay in place at the above rate until you elect to have it changed.
2. The cost of any Parking facility or lot for the purpose of work are considered eligible to use your Voya debit card to purchase.
3. Parking expenses include:
 - The cost of parking at or near the place of work, and at or near the mass transit provider that employees use to commute to work.

New Form Section 4 Debit Card

SECTION 4. DEBIT CARD

If you are a current participant in either the Transit or Parking benefit and currently have a debit card, you will continue to use the same card with the changes made on this form today. If you are canceling your contribution to either benefit temporarily and intend to resume contributions at a later time, please hold on to your debit card. If you are a new participant to this benefit, you will receive a set of 2 debit cards in the mail in approximately 7-10 business days from the date when this form is processed in our system, which is after the enrollment window closes. Please click on the above Transit or Parking Election Change Process Calendars to see the deadlines.

I understand that:

1. Any money unclaimed from my reimbursement account(s) at the end of the plan year will be carried over to the next Plan Year.
2. My Social Security benefits may be reduced by this election.
3. I must also agree to the Yearly Certification Form online.
4. The cost to administer the Transit and Parking program is paid by each employee on a pre-tax basis. The monthly administrative fee is \$1.50 for Transit alone, Parking alone, or if you choose to participate in both the Transit and Parking programs you only pay the \$1.50 administration fee for both.

I agree

New Form Section 5- Agreement Disclaimer

SECTION 5. COMMONWEALTH OF MASSACHUSETTS QUALIFIED TRANSPORTATION BENEFIT PLAN YEARLY CERTIFICATION

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

➔ Signature (Required) _____ Date _____

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!

Trending Topics

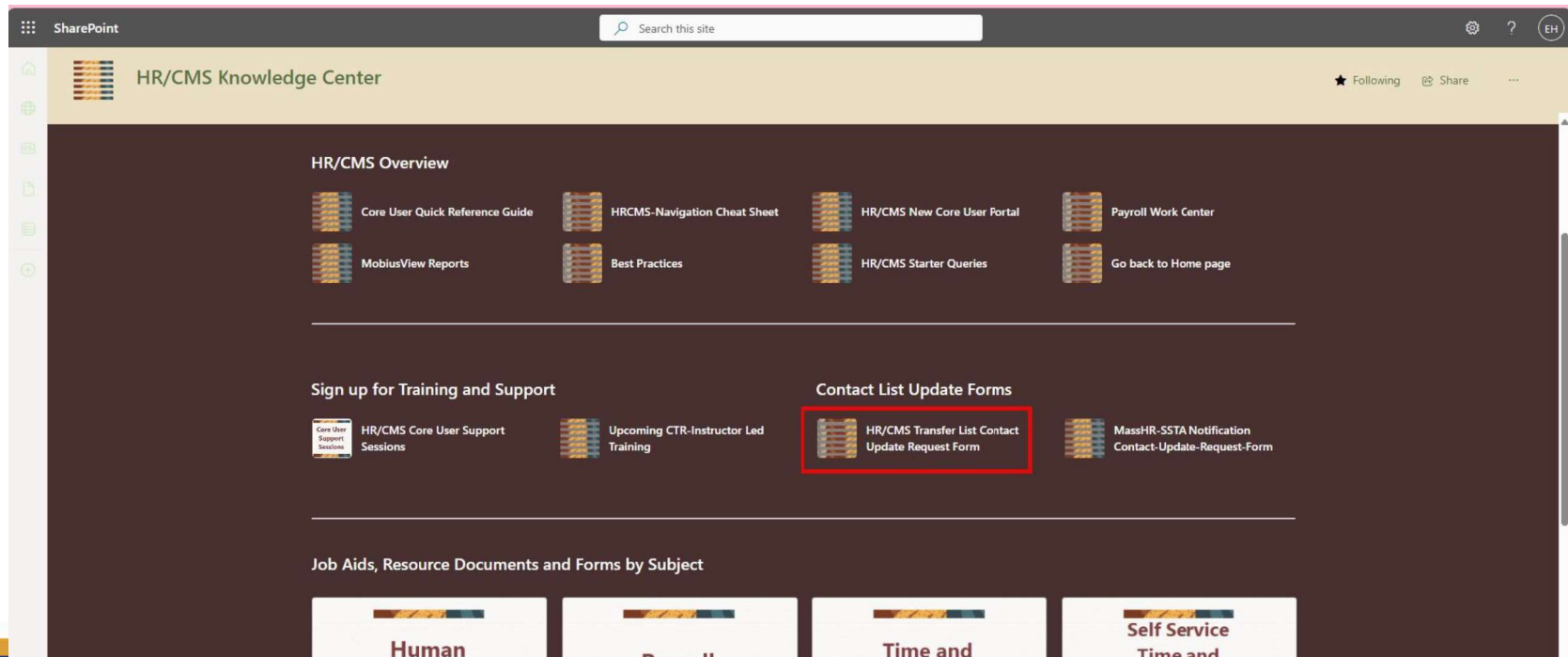
Evanice Henniger

Director of Business Partner Engagement

Updating Contact Lists

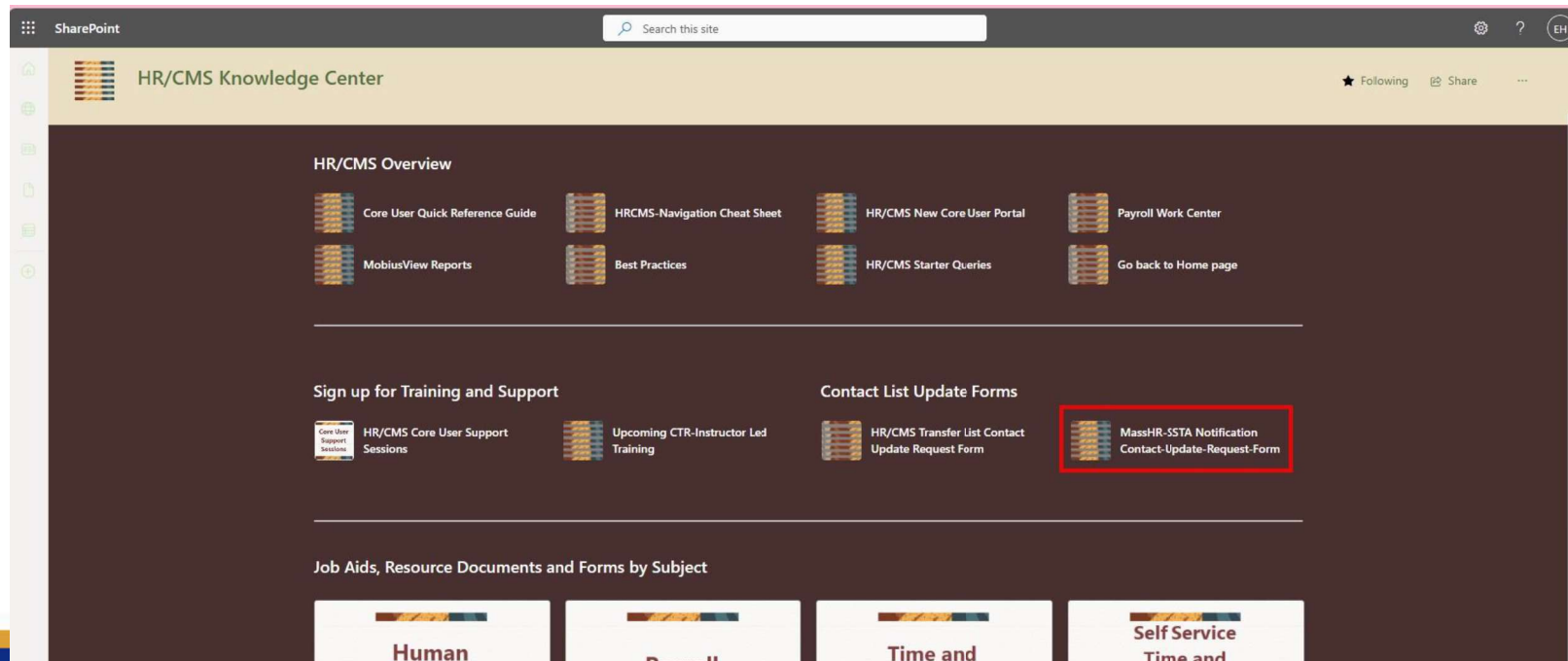
HR Contact List/Transfer Contact

- **Navigate:** HR/CMS Knowledge Center > HR/CMS Overviews, Guides, Job Aids, Forms and Reference Documents > HR/CMS Transfer List Contact Update Request Form



HR/CMS Department Notifications

- **Navigate:** HR/CMS Knowledge Center > HR/CMS Overviews, Guides, Job Aids, Forms and Reference Documents > MassHR – SSTA Notification Contact – Update Request Form



Key Agency Contacts

- [CTR Intranet](#)

The screenshot displays the CTR Intranet website. At the top left is the Office of the Comptroller of the Commonwealth of Massachusetts logo. The main header includes the text 'CTR INTRANET' and navigation links: 'CLOSE/OPEN', 'STATEWIDE LEARNING', 'E-SIGNATURES', 'SOLUTION DESK', and 'CTR PUBLIC SITE'. A secondary navigation bar contains 'Resources for Departments', 'Reports and Publications', 'CTR Cyber', 'CTHRU', 'CTR Announcements', and 'About'. A dropdown menu for 'Key Documents' is open, listing 'Fiscal Year Memos', 'Policies', 'Forms', 'Regulations', 'Expenditure Classification Handbook', 'Revenue Handbook', and 'Statewide Key Contact Lists'. The 'Statewide Key Contact Lists' item is highlighted with a red box. The main content area features a large banner with the text 'Welcome to the CTR Intranet' and a background image of hands typing on a keyboard. Below the banner are sections for 'Latest updates', 'Cybersecurity Awareness from Comptroller William', 'PayInfo', 'Learning Management System Update', 'Federal Grants', and 'Statewide Learning'. A 'READ OCTOBER 1 WEEKLY UPDATE' button and a 'VIEW PAST ISSUES' link are also visible.

Key Contact Lists

- ★ Department Heads
- ★ Department CFO's
- ★ Department DSO's
- ★ GAAP Liaisons
- ★ General Counsels
- ★ Internal Control Officers
- ★ MOSAIC Liaisons
- ★ Payroll Directors
- ★ Single Audit Liaisons

ServiceNow Ticket

- ★ To update the following contact lists please submit a ServiceNow ticket with Payroll
 - ★ Smart Plan
 - ★ Unemployment
 - ★ TASC
 - ★ Benefit Strategies

GIC Contact

- [GIC Coordinator site](#) - [Form](#)

[Home](#) > [GIC Home](#) > [State Employee Benefits](#)

OFFERED BY [Group Insurance Commission](#)

Find Your GIC Benefit Coordinator

It is important for you to locate your proper coordinator in order to get the most accurate information.

LOG IN TO... ▾

⚠ Notices & Alerts Hide

👤 2025 Tufts Health Plan Scholarships (For All GIC Members) Due November 7th | Updated Sep. 22, 2025, 12:30 pm +

GIC benefit Coordinators process all GIC benefits for employees. Search for your agency's or municipality's coordinator using the list below. If you are a retiree or survivor, contact the GIC for assistance at (617) 727-2310.

[GIC State Coordinator List](#)

[GIC Municipal Coordinator List](#)

GIC Coordinators can [update contact information](#) year-round to stay up-to-date on all GIC benefit information.

CONTACT

Group Insurance Commission

🖥 Online

Recommended
[GIC online contact form](#) →

📞 Phone

Main Phone (617) 727-2310
M-F 8:45 a.m. - 5 p.m.

Feedback

HR/CMS Upgrade

New Look & Feel



Enhanced Search Pages

Review Paycheck

Find an Existing Value

▼ **Search Criteria**
Enter any information you have and click Search. Leave fields blank for a list of all values.

Recent Searches
Saved Searches

Company	<input type="text" value="begins with"/>	<input type="text"/>	Pay Group	<input type="text" value="begins with"/>	<input type="text"/>
Pay Period End Date	<input type="text" value="="/>	<input type="text"/>	Off Cycle ?	<input type="checkbox"/>	
Page Nbr	<input type="text" value="="/>	<input type="text"/>	Line Nbr	<input type="text" value="="/>	<input type="text"/>
Separate Check Nbr	<input type="text" value="="/>	<input type="text"/>	Paycheck Number	<input type="text" value="="/>	<input type="text"/>
Empl ID	<input type="text" value="begins with"/>	<input type="text"/>	Name	<input type="text" value="begins with"/>	<input type="text"/>

^ Show fewer options

Case Sensitive





Search Results

Review Paycheck

Find an Existing Value

Search Criteria

Enter any information you have and click Search. Leave fields blank for a list of all values.

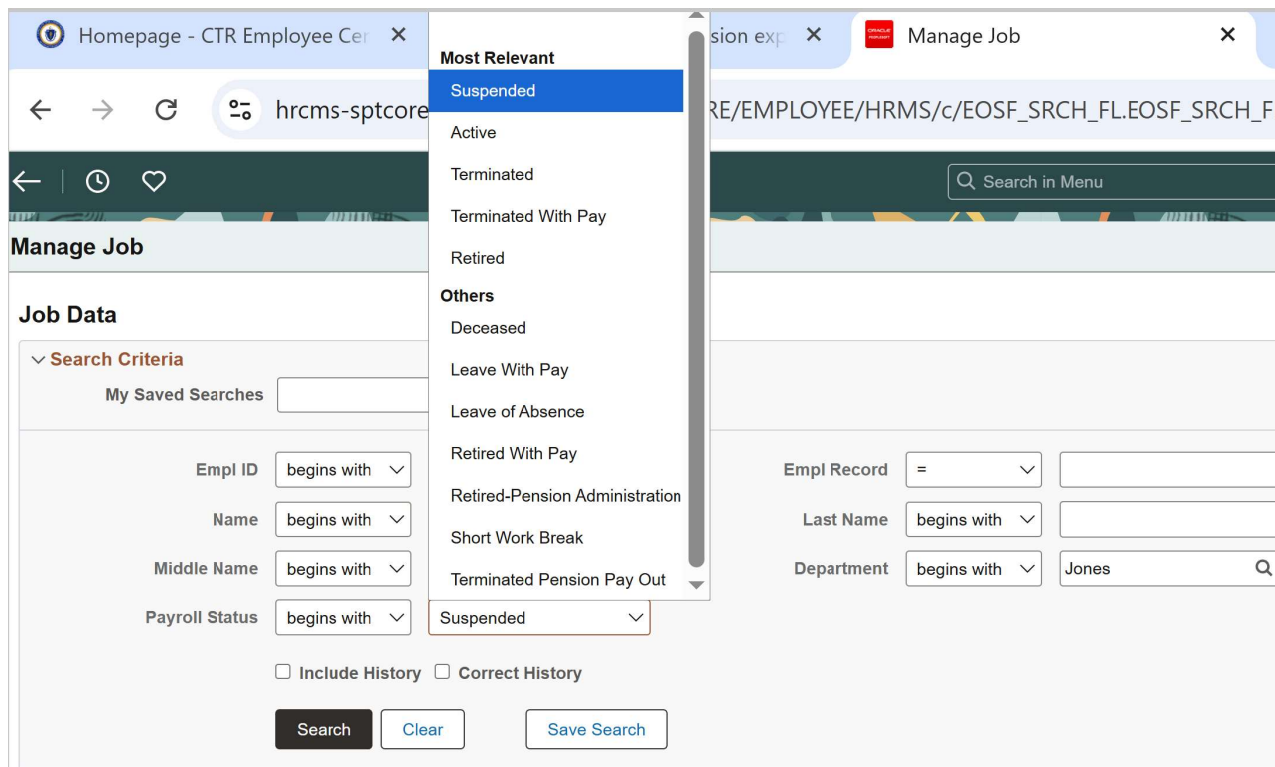
 Recent Searches	Choose from recent searches		 Saved Searches	Choose from saved searches	
Company	begins with	<input type="text"/>	Pay Group	begins with	<input type="text"/>
Pay Period End Date	=	<input type="text"/>	Off Cycle ?	<input type="checkbox"/>	
Page Nbr	=	<input type="text"/>	Line Nbr	=	<input type="text"/>
Separate Check Nbr	=	<input type="text"/>	Paycheck Number	=	<input type="text"/>
Empl ID	begins with	<input type="text" value="██████"/>	Name	begins with	<input type="text"/>
<input type="checkbox"/> Case Sensitive					
<input type="button" value="Search"/> <input type="button" value="Clear"/> <input type="button" value="Save Search"/>					

Search Results

Only the first 300 results of a possible 635 can be displayed. Empl ID ██████



Drop Down Feature



Timesheet

		Sun 2/8	Mon 2/9	Tue 2/10	Wed 2/11	Thu 2/12	Fri 2/13	Sat 2/14	Total	TRC
+	-	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		<input type="text"/> 

Submit





METRO
CREDIT UNION

*The credit union for
Massachusetts State Employees*

March 2026 Updates





2025 Community Impact Report

- 170 Financial Wellness Seminars
- Nearly \$400K in Community Support
- Launch of Greenlight, Penny Finance, MAP





Penny Finance

- Get your future net worth with a three-minute, 12 question money quiz
- Link your accounts to build (and download) your 5-step financial plan
- Take bite-sized money courses on topics like credit cards and investing
- Receive personalized insights on your money

FREE Benefit
(Save up to
\$120/yr)

Lets track your progress towards retirement

If you keep contributing \$500/month to retirement, you will be on track to retire with \$719,010 around 65 years old.

Have you saved enough?

Your savings account will cover \$10,328/month of expenses for a full year. Does that feel good to you?





Metro Assistance Portal (M.A.P Powered by Starlight)

- More than \$2M in benefits
 - 13% of MCU Staff (\$400K)
 - Member Pilot (\$1.7M)
- Benefits Include
 - SNAP
 - Medicaid / ACA
 - LIHEAP
 - WIC
 - Workforce Advantage
 - Down Payment Assistance (DPA)

AWARD-WINNING IMPACT:

Starlight's value shows up in individual member stories.
Here are three examples from Metro's pilot:

SNAP & RAFT Dual Support: \$12,300+/year

A member struggling with housing costs checked SNAP eligibility (approximately \$4,800/year) and found local food banks. They discovered eligibility for RAFT, Massachusetts' rental assistance program offering up to \$7,000 annually, and automatically queued a follow-up for utility benefits in winter (around \$500/year).

SNAP Reconsideration Success: \$3,600-\$6,000/year

A member missed their SNAP application deadline and used M.A.P. powered by Starlight to discover a 30-day reconsideration window and connections to their local food bank. The result: a 15-day extension that restored \$300-\$500 in monthly food support.



Family Support Package: \$21,000/year

A household of four applied for SNAP (approximately \$6,000/year), checked Medicaid eligibility (coverage worth roughly \$3,000/year), and accessed childcare assistance (up to \$12,000+/year). They connected with their local job center and scheduled follow-up notifications for utility assistance.



Scholarship Opportunity



- Be a high school senior at the time of application
- Be dependent * children of Metro Credit Union members, or members themselves, who have a minimum of six months membership with the credit union as of the application deadline date.
- Plan to enroll for the first time in full-time undergraduate study at an accredited two- or four-year college, university or vocational-technical school for the entire upcoming academic year
- Have a minimum grade point average of 3.0 on a 4.0 scale (or its equivalent)

Deadline:
Wednesday, April 21st, 2026





Metro Benefits

- Financial Wellness Seminars
 - First Time Homebuyer
 - General Investment
- Metro Insurance Advisors
 - Members receive exclusive discounts
- Metro Investment Services
- M.A.P. powered by Starlight
- Get My Rate

Exclusive Member Benefits

- Low- and No- Cost Accounts
- Checking Account Exclusives
 - Metro Rewards (Earn points for everyday activities)
 - Metro Perks* (Up to \$1,200/yr in savings)
 - Greenlight* (\$70/yr value)
- Scholarship Opportunity
- Penny Finance (\$120/yr value)
- Retirement Loan (State Employee Exclusive)





2026 Benefit Fairs / Open Enrollment

- Calendar is booking FAST
- Bring the financial resources direct to your staff
- Available for a block of time
- Drop-in sessions or pre-scheduled
- Helps remove barriers to financial success





IMPORTANT - 2027 HR/CMS Payroll Calendar

- Changes that will be coming to the 2027 HR/CMS Payroll Calendar Process
 - We **will** still be doing poster size calendars
 - We **will not** be doing custom orders
- While we iron out final details
 - Designate one person from your agency from either Human Resources or Payroll
 - Complete this [survey](#) or scan the code to the right
 - Attend future HR/CMS User Group Meetings

Next Steps





2nd Quarter Seminars – First Time Homebuying

- Friday, April 10th – 1pm-2:30pm
- Thursday, April 23rd – 6pm-7:30pm
- Presented by:

Deb Frank

VP Mortgage Relationship Manager





Dedicated Resource



Brandon Williams, CCUFC

Metro@Work Relationship Manager

E: BWilliams@MetroCU.org

O: 877.MY.METRO ext. 5408

C: 781.823.9685



Tips & Tricks

Tryntje Bumgardner

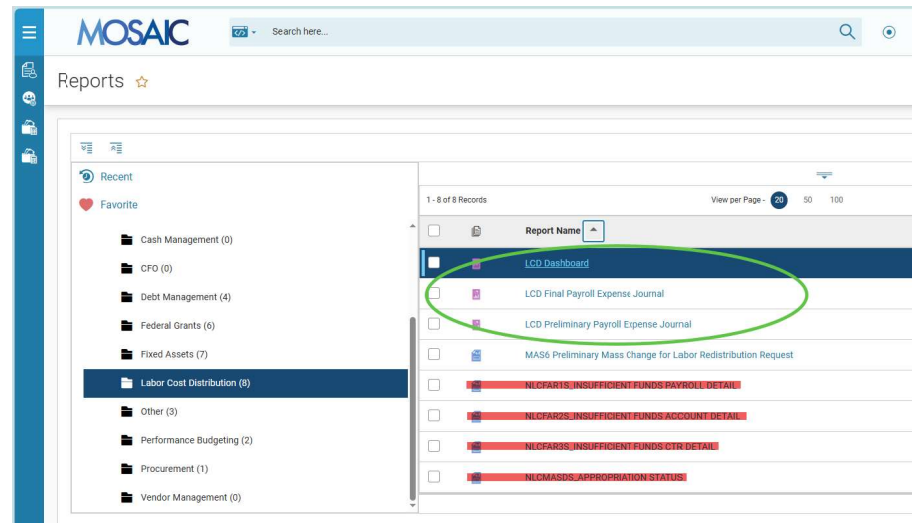
Assistant Comptroller Payments & Payroll

Labor Cost Distribution (LCD)

- ★ Changes to transaction names:
 - ★ LCRR – Labor Cost Redistribution Request (LARQ)
 - ★ PREXC – Payroll Expense Correction (PRADJ)
 - ★ ESMT – Employee Maintenance (EMTL)
 - ★ PSMT – Position Maintenance (PMTL)
- ★ MAS4 and MAS6: Mass change requests for Accounting Data(DEPTA) and Labor Distribution (LCRR)
- ★ Drop-through values are no longer available
- ★ Alternate Accounting (PALT) no longer available
- ★ Department 9s accounts no longer exist

Mosaic Insights

- ★ The dashboards are working and are real-time based on information in Mosaic
- ★ The reports are being updated and should not be used until further notice



Mosaic Features

- ★ Department – Uncheck Select All, type your 3-letter department code, click on the check box to select the department and

MOSAIC

ALL - Search here...

LCD Preliminary Payroll Expense Journal

Latest Refresh Date Time
3/10/2026 4:36:43 PM

LCD Preliminary Payroll Expense Journal

Reset Selections

Summary				Ask Me Anything				
FY	Pay Period End Date	CABINET	DEPARTMENT	UNIT	EMPLOYEE_ID	On/Off Cycle	Status	Total Payroll Amount (Preliminary)
All	All	All	OSC: OFFICE OF TH...	All	All	All	All	\$556.07K

More options

GTN_RUN_NO PAY CYCLE EMPLOYEE ID Alt Appt ID First Name Last Name HOME UNIT Fiscal Year Accounting Period PAY_EVNT_BGN_DT EVNT_DT CONTRACT PAY AMOUNT Event Type OBJECT FUND SUB FUND DEPT APPR UNIT UNIT ACTIVITY FUNCTION PROGRAM

Focus Mode View & Export

The screenshot shows the MOSAIC system interface for the LCD Preliminary Payroll Expense Journal. A modal dialog box titled "Which data do you want to export?" is displayed over the data table. The dialog offers three options: "Data with current layout" (selected), "Summarized data", and "Underlying data". Below these options is a "File format:" dropdown menu set to ".xlsx (Excel 150,000-row max)". "Export" and "Cancel" buttons are at the bottom of the dialog. A red arrow points to the ellipsis menu icon in the top right corner of the table area.

GTN_RUN_NO	PAY CYCLE	EMPLOYEE ID	Alt Appt ID	First Name	Last Name	HOME UNIT	Fiscal Year	Accounting Period	PAY_EVTN_BGN_DT	EVNT_DT	CONTRACT PAY AMOUNT	Event Type	OBJECT	FUND	SUB FUND	DEPT	APPR UNIT	UNIT	A
202603071	EMPL					8344							A07	0010	0000:				4 4:
202603071	EMPL					8344							A08	0010	0000:				4 4:
202603071	EMPL					8344							A08	0010	0000:				4 4:
202603071	EMPL					0993							AA1	0010	0000:				3 C
202603071	EMPL					1975							A01	0010	0000:				5 :
202603071	EMPL					1975							A01	0010	0000:				5 :
202603071	EMPL					1975							A01	0010	0000:				5 :
202603071	EMPL					0294							A01	0100	0000:				0 4:
202603071	EMPL					0294							A01	0100	0000:				0 4:
202603071	EMPL					0294							A01	0100	0000:				0 4:
202603071	EMPL					0132							A01	0690	0690:				0 :
202603071	EMPL					0132							A01	0690	0690:				2 9:
202603071	EMPL					0132							A08	0690	0690:				2 9:
202603071	EMPL					0993							AA1	0010	0000:				3 C
202603071	EMPL					1975							A01	0010	0000:				5 :
202603071	EMPL					1975							A01	0010	0000:				5 :
202603071	EMPL					1975							A01	0010	0000:				5 :
202603071	EMPL					9000							A01	0100	0000:				0 :
202603071	EMPL					0993							AA1	0010	0000:				3 C
202603071	EMPL					0993							AA1	0010	0000:				3 C
202603071	EMPL					7001							B01	0010	0000:				1 :
202603071	EMPL					0132							A01	0690	0690:				2 9:
202603071	EMPL					3453							A01	0010	0000:				3 5:
202603071	EMPL					3453							D24	0010	0000:				3 5:
202603071	EMPL					0132							A01	0690	0690:				0 :
202603071	EMPL					0132							A01	0690	0690:				2 9:
202603071	EMPL					0132							A01	0690	0690:				2 9:
202603071	EMPL					0132							A01	0690	0690:				2 9:
202603071	EMPL					0132							A01	0690	0690:				2 9:

Do Not...

⚠ Do not future-date hires into the next fiscal year. Budget information for the upcoming fiscal year is not yet available in Mosaic/LCD, and as a result, ESMT (EMTL) will reject these hire transactions.

⚠ Do not repurpose combo codes as changing the financial data creates time slices which cause overpayments.

Role Selection

The screenshot displays the MOSAIC system interface. At the top, the MOSAIC logo is on the left, followed by a search bar with the text "Search here...". To the right of the search bar are navigation icons: a magnifying glass, a play button, a pause button, and a stop button. Further right are a home icon, a star icon, and a user profile icon labeled "EH" with the name "Evanice Henniger" and role "LCD Oversight". A red arrow points to the user profile icon.

Below the navigation bar is a row of dashboard tiles: "Worklist", "Transaction Catalog FIN", "Transaction Catalog HRM", "Search Page", "Report Listing" (highlighted with a red border), "Job Aids", and "Policies".

The "Worklist - Financial" section is visible below the tiles. It includes a dropdown menu set to "All" and a summary card showing "0 Total" and "0 Others".

Below the summary card is a table with the following columns: "Level", "Transaction Code", "Department", "Transaction ID", "Assigned Date", and "Priority". The table currently displays "No Records Found".

The user profile dropdown menu is open, showing the user's name "Evanice Henniger", role "LCD Oversight", and options for "Account Settings" and "Sign out". Below this, a list of roles is shown: "My Roles", "System Administration", "LCD Oversight" (highlighted in dark blue), and "Procurement Professional".

Preferences

Account Settings



[Redacted Name]
[Redacted Email]

Personal Information

Password Management

Security Question Management

Preferences

Manage Notifications

Business Roles Preferences

Business Role Name	Business Role Description	Primary	Display Order
System Administration		No	1
DSO/CTG/Communications		No	2
LCD Oversight		Yes	3
Budget Control (Oversight)		No	4
Accountant		No	5

Mosaic Resources

★ [Mosaic Resource Library - Office of the Comptroller Intranet](#)

- Job Aids
- FAQ
- Fact sheets
- Videos
- Help Desk Link





Massachusetts Deferred Compensation SMART Plan

Payroll Users Group Meeting

March 11, 2026

SMART Plan Agenda



- 2025 Year-End Statistics
- Reminder – 2026 contribution limits
- Special Catch-up procedure
- Open Enrollment
- Retirement Plan Advisors

2025 Statistics



	<u>2025</u>	<u>2024</u>
■ Total Plan Assets	\$15.2 Billion	\$13.7 Billion
■ Total Contributions	\$681.6 Million	\$591.8 Million
■ Full-time participant accounts	122,167	120,025

Thank you for supporting the SMART Plan!

Catch-Up Remittances



■ Current Limits:

- \$24,500
- Special catch-up: \$49,000
- Age 60 – 63 Catch-up: \$11,250
- Age 50 Catch-up: \$8,000 (increase from 7,500)

■ Please review catch-up indicator on file

- If you have questions, please contact the SMART alias:
smart@empower.com

Special Catch-up



- Note: Cannot be in special catch-up if over age 70 1/2 (as stated in plan document)
- Look for indicator on file for approval
- Ppt must have worksheet completed
- When a participant elects the Special Catch-Up provision, a "Catch-Up" indicator is displayed
- *Employee must have this approval before participating in Special Catch-up, including Sick/Vacation pay deferrals*

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

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

Open Enrollment



- During open enrollment period, if sending info to employees about benefits:

- Great time to remind employees about the SMART Plan
- Link to website: www.mass-smart.com

- Note: Employees can enroll in the SMART Plan anytime

- Suggested language:

The Massachusetts Deferred Compensation SMART Plan is a (457) retirement savings program offered to you. You can email smart@empower.com for instructions on how to enroll online or by form. Please keep in mind that SMART Plan Retirement Plan Advisors are representatives of Empower and are available to meet with you at no cost.

SMART Retirement Plan Advisors Page



- All RPA's listed; click for your RPA

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

- Individual appointments can be booked via the SMART Plan website:

www.mass.smart.com >

Plan Resources >

Find your Representative

Welcome to the Massachusetts SMART Plan's Retirement Plan Advisor (RPA) scheduling page. Please use this page to make a free virtual or in-person appointment with any of our qualified RPAs to answer questions relating to your retirement and the Massachusetts SMART plan. Our customer service center is also available to answer any other questions.

SMART Plan Customer Service Center
Call us today at 877-457-1900. Available weekdays from 8 a.m. to 10 p.m. and Saturdays from 9 a.m. to 5:30 p.m. Eastern time.

Regional Service Center Waltham
255 Bear Hill Road Suite 203
Waltham, MA 02451

Correspondence should be directed only to the Regional Service Center.

Springfield
One Financial Plaza
1350 Main Street, Suite 1213
Springfield, MA 01103

Not sure who your RPA is?
Choose "**NO RPA PREFERENCE**" or email us at:
SMART@empower.com.

Puede ver su sitio web en español. Simplemente inicie sesión en su

Choose your Retirement Plan Advisor (RPA)

NO RPA PREFERENCE? Click here. >



Ngan Wedemeier
Outside of Boston + North Shore Courts & MA SMART Retirees >



Jesse Pawlowski
South Shore, Cape Cod and the Islands & MA SMART Retirees >



Michael Geraghty, CRPC®
MBTA, UMass Boston, Boston Housing Authority, Boston Public Schools, MA SMART Retirees, Essex, Middlesex & Suffolk County Sheriff's Departments. >



Scott Magnacca, CFP®
UMass Worcester, Worcester State University & Pappas Hospital + Out of State SMART Plan Retirees >



Michael O'Brien, CRC®
City of Boston, North of Boston + Boston Police, Fire & MA SMART Retirees >



Peter Tziachris
Worcester & North of Worcester + City of Worcester, Fitchburg State & SMART Plan Retirees >

Questions?



SMART@Empower.com

Thank you

Resources & References

Support Resources

★ EOTSS ServiceNow

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

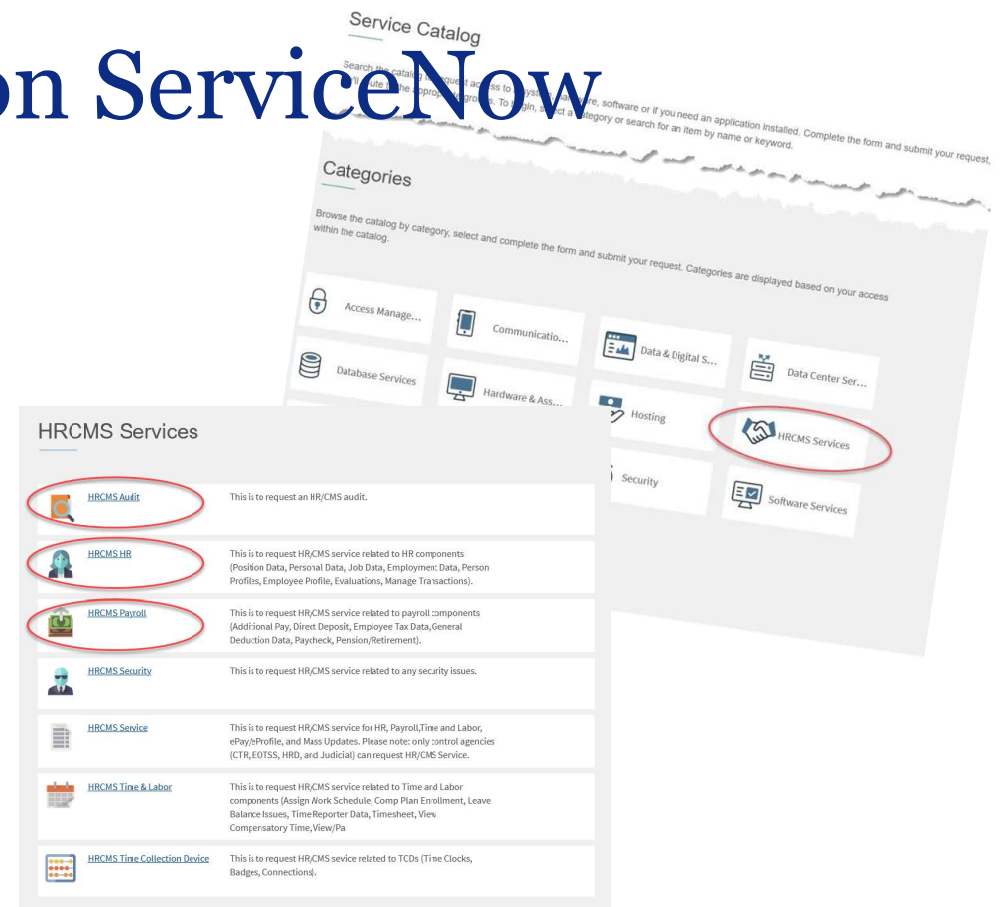
★ CTR Solution Desk

- <https://www.macomptroller.org/solution-desk/>
- Should be used for LCD or MOSAIC issues

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

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



Reference Resources

★ <https://intranet.macomptroller.org/mosaic-resource-library/>

Thank you

Next Meeting: June 10, 2026