

# HR/CMS User Group Meeting

June 10, 2026



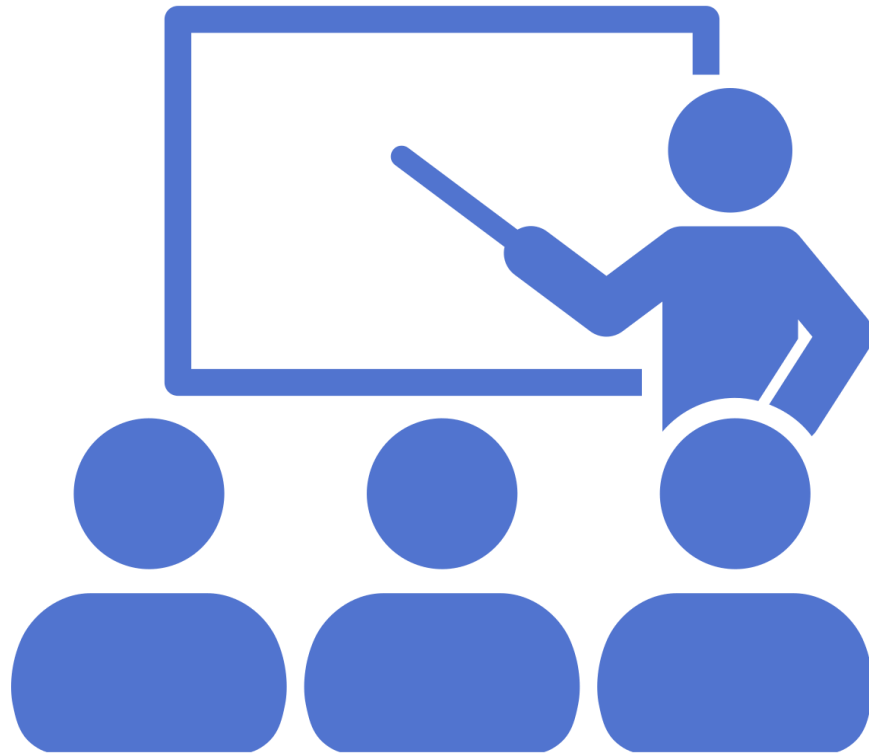
OFFICE OF THE COMPTROLLER  
COMMONWEALTH OF MASSACHUSETTS



ATLANTIC COD | OFFICIAL STATE FISH

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Thank you!

# Welcome



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

# Agenda

- ★ **Welcome – Bill McNamara, Comptroller**
- ★ **Fiscal Year-End/Accounts Payable**
- ★ **Ameriflex**
- ★ **DYNA Cash Review**
- ★ **BEST Phase 2**
- ★ **Empower/SMART Plan**
- ★ **Trending Topics**
- ★ **Metro Credit Union**
- ★ **Resources & References**

# Opening Remarks

**Bill McNamara**

**Comptroller of the Commonwealth**

# 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 2026-2027
- Close/Open Boot camps



# C/O Fiscal Year Considerations

## ★ For the upcoming Close/Open season:

- Identified FY2027 COA Alterations – updated APPRs, LDPRs, Programs or other Detail Accounting
- Planned for any position transfer and LCD distributions for FY27
- Reviewed forthcoming payroll and determined whether a Payroll Hold is necessary.
- Do not over-encumber
- Do not forget PF&I for the remainder of the year
- Do not create a Payroll Hold *for* PF&I

# Key Dates

- ★ **For PPE June 27 – Last full payroll of FY2026**
  - June 26<sup>th</sup> – Last day for HR & Garnishment transactions in HR/CMS
  - June 29<sup>th</sup> – Last day for posting Time & Attendance
  - June 30<sup>th</sup> – Last day for making Labor Distribution changes in LCD
- ★ **Finalize all Payroll Hold activity for AP by June 30<sup>th</sup>.**
- ★ **PPE July 11<sup>th</sup> – Payroll is prorated by business days of the pay period (Mon - Fri). Monday June 29<sup>th</sup> and Tuesday June 30<sup>th</sup> are the only business days for FY26 within this period resulting in a 20/80 Split.**

# Split Year Earnings

- ★ Earnings Posting to FY2026 – Reimbursements (BB level and C98 for Contractors); Retro Earnings; Settlement & Judgments; Sick, Comp and Vacation Buyouts Entered as Hours (CBB, SBB, VIL); if applicable, Furloughs paid under FCT; Deficiency Codes (PYD)
- ★ Earnings Posting to FY2027 - Sick, Comp and Vacation Buyouts Entered as Amounts (CBA, SBA, SVP, VLA); if applicable, Furloughs paid under FUR
- ★ All other Earnings are considered Non-Specific and will go through the split allocation aside from the below exceptions
  - Prior Period Adjustments entered in Timesheet on a date prior to 6/28/2026
  - LCD intervention can avoid summarization and create daily postings
- ★ Terminations (TER) and Terminations with Pay (TWP) should not be entered in HR/CMS until the following pay period (PPE 07/25/2026)

# HR/CMS Account Code Roll

- ★ **New report, now available (every Friday in June)**
- ★ **HMMARS3 Report identifies:**
  - All positions assigned to invalid accounts
  - If incumbent exists, then EMPLID ID and Rec # are shown
- ★ **Agencies must take corrective action before 6/30/2026**
- ★ **Failure to act will result in positions being automatically updated on July 16<sup>th</sup>**
- ★ **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 16<sup>th</sup>**
- ★ **Higher Education agencies will not occur until the Fall of 2026**
- ★ **Includes all Active contractors hired before and unpaid since October 1, 2025**
- ★ **Departments will be notified**
- ★ **Mobius report is HMPCS004 – Termination of Contract Jobs**

# Payroll Receipt Vouchers

- ★ Please send to the Comptroller's team first – [PRRV@mass.gov](mailto:PRRV@mass.gov)
- ★ All vouchers for any pay periods should be submitted ASAP
- ★ As a reminder, no PRRVs will be processed during Split Week



# LCD Rules Roll – POAA Rules

- ★ All current rules have been expired with an End Date of 06/30/2026
- ★ Draft rules for FY2027 were available as of 06/05/2026
- ★ Departments should review draft rules and delete any rules that will not apply to FY2027. Please reach out with questions via ticket.
- ★ 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
  - Rule's Request Form is no longer used
  - Departments should retain a signed copy of rules on file
- ★ New Rules for FY2027 must have a From date of 7/1/2026 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
  - C26 (to indicate that it is a Create rule generated in Calendar Year 2026)
  - Unique number
- ★ **Departments can enter \*C26\* as the Document ID search criteria to find all draft POAA rules**

# PALT, DEACC and Others

- ★ **PALT Rules – this functionality has been retired and no longer exists in Mosaic**
- ★ **DEACC – Please contact Statewide Payroll Team to request removal of rules that no longer apply for FY2027**
- ★ **PCREQ/DEPTAs/LDPRs – Will continue to be in effect for FY2027; departments should review and make any changes needed. Again, if questions arise please reach out via ticket and/or email**

# Accounts Payable Period

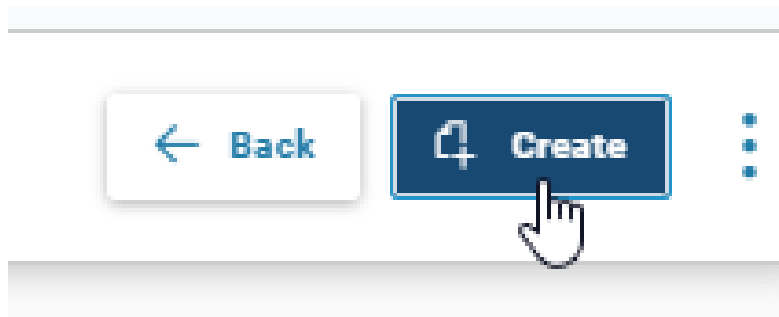
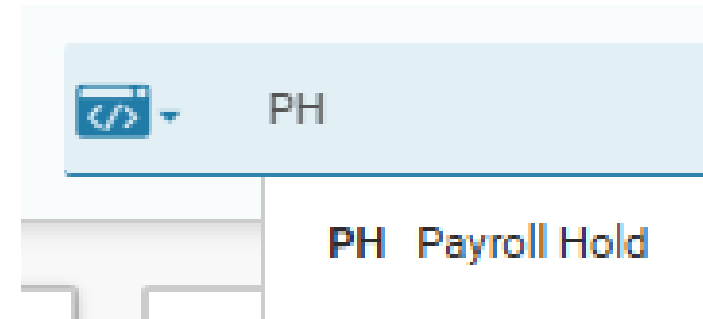
- ★ **Pay Periods Ending: 07/25/2026, 08/08/2026, and 08/22/2026**
- ★ **Two ways to charge FY2026:**
  - Enter prior period adjustment in timesheet for date prior to June 28<sup>th</sup>
  - Use an Accounts Payable earning code in Additional Pay
  - Refer to forthcoming CTR Earnings Code Processing during AP Periods memo for comprehensive list of AP Earning Codes
- ★ **Require Payroll Hold in the corresponding Appropriation and Object Level combination**

# Payroll Holds

- ★ **The functionality of Payroll Holds has changed in Mosaic. Currently, the purpose is to encumber funds and therefore prevent rolling to the new FY**
- ★ **After June 30, 2026, Payroll Holds will be added to the list of transactions requiring A&F approval for submissions or alterations more than \$50,000 for Type 01 APPRs**
- ★ **Make sure you have enough money to cover FY2026 charges through Split Year before you encumber money in a PH**
- ★ **Are NOT required for Split Year or DD level encumbrances**

# Payroll Holds in Mosaic

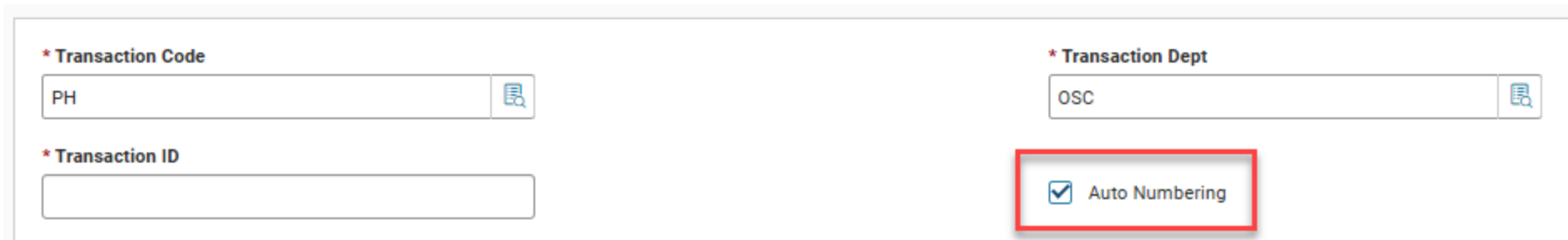
Navigate to the PH (Payroll Hold) page in Mosaic



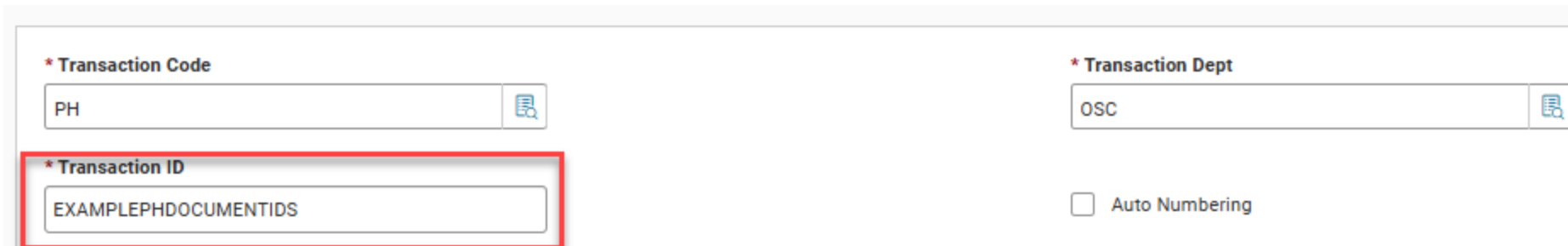
Click on the Create icon to begin the process of entering data in Mosaic

# Payroll Holds in Mosaic – Transaction ID

★ There are two methods for entering the Transaction ID:



This screenshot shows a form with two columns. The left column has a field for '\* Transaction Code' containing 'PH' and a field for '\* Transaction ID' which is empty. The right column has a field for '\* Transaction Dept' containing 'OSC' and a checkbox labeled 'Auto Numbering' which is checked. A red box highlights the 'Auto Numbering' checkbox.



This screenshot shows the same form. The '\* Transaction Code' field contains 'PH' and the '\* Transaction Dept' field contains 'OSC'. The '\* Transaction ID' field is now filled with the text 'EXAMPLEPHDOCUMENTIDS' and is highlighted with a red box. The 'Auto Numbering' checkbox is unchecked.

# Payroll Holds in Mosaic - Header

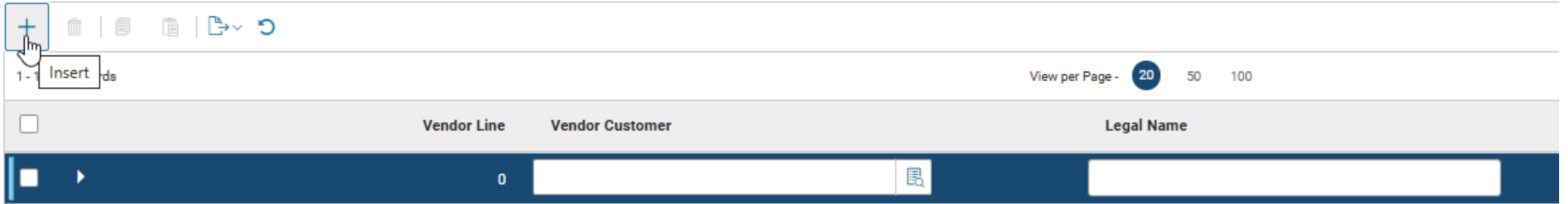
General Information

Transaction Name		Record Date		Budget FY	
<input type="text"/>		<input type="text" value="MM/DD/YYYY"/>		<input type="text" value="2026"/>	
Fiscal Year	Period	Transaction Description		Actual Amount	
<input type="text" value="2026"/>	<input type="text" value="12"/>	<input type="text"/>		<input type="text" value="\$0.00"/>	
Expected Amount		Accounting Profile		Contact Code	
<input type="text" value="\$0.00"/>		<input type="text"/>		<input type="text"/>	

★ On the Header, the below fields must be entered

- Fiscal Year
- Budget FY
- Period

# Payroll Holds in Mosaic - Vendor



★ On the Vendor screen, all that is required is adding a new line by selecting the + icon signifying "Insert". This adds in a blank vendor line. This is the sole requirement for this tab.

# Payroll Holds in Mosaic - Accounting

Vendor (1)

1 - Insert

View per Page - 20 50 100

Accounting Line	Line Amount	Fund	Department	Unit	Object	Activity	Attachments	Appr Unit
1	\$10,000.00		OSC		A01			10000001

General Information   Open/Closed Details   Reference   COA

**Event Type**  
PR57

**Budget FY**  
2026

**Reserved Funding**  
- Select -

**Related Accounting Line**

**Accounting Template**

**Fiscal Year** 2026   **Period** 12

**Roll Indication 1**  
No

**Roll Indication 2**  
No

**Line Description**

**Debt ID**

★ Line Amount, Department, Object, Appr Unit, Event Type, Budget FY, Fiscal Year and Period must be entered. All others infer.


# Payroll Holds in Mosaic - Accounting

- ★ **Line Amount** – this is the value to be held
- ★ **Department** – the department in question
- ★ **Object** – A01, B01, etc.
- ★ **Appr Unit** – the appropriation from which funds are to be held
- ★ **Event Type** – PR57 before 07/01, PR58 thereafter
- ★ **Budget FY and Fiscal Year** - 2026
- ★ **Period** – the current open Accounting Period

# Payroll Holds in Mosaic - Accounting

- ★ Specific Object Codes are no longer required
- ★ Condense all Object Codes into Object Level and use the 01 equivalent to hold

Former Method in LCM		Current Method in LCD	
Appropriation	OSC/10000001	Appropriation	OSC/10000001
A01	\$ 5,000.00	A01	\$ 7,000.00
A08	\$ 1,000.00	B01	\$ 3,000.00
A11	\$ 1,000.00		
B01	\$ 2,000.00		
B10	\$ 500.00		
B92	\$ 500.00		
<b>Total AA</b>	<b>\$ 7,000.00</b>		
<b>Total BB</b>	<b>\$ 3,000.00</b>		



# Deficiency Payroll

- ★ If you do not get all payments entered before 8/22/2026, any prior fiscal year payments will have to be processed as deficiencies as there will be no further mechanism to charge FY26
- ★ 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 LCD
- ★ PYDs will not be accepted or reviewed until after 08/31/2026

# Questions?

# Commonwealth of MA GIC

HRCMS Meeting

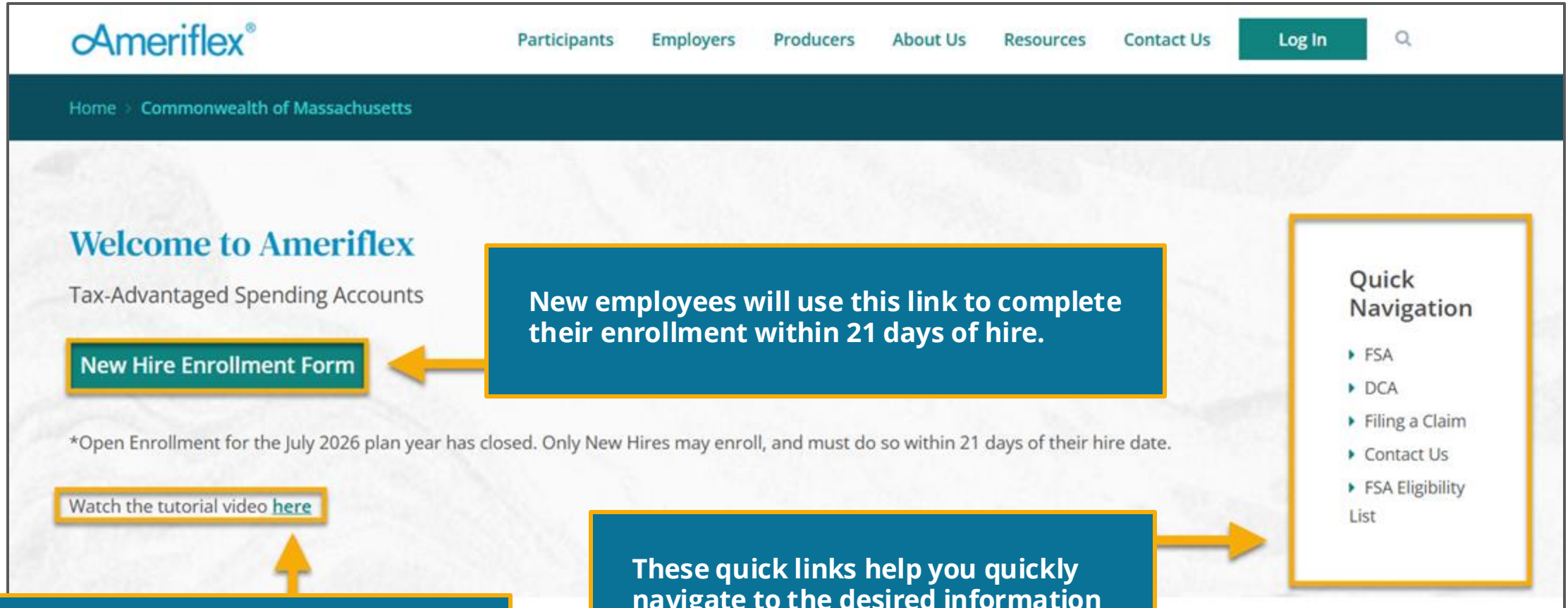
Ameriflex

# Overview

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1. **Available resources on the Ameriflex Microsite**  
- <https://myameriflex.com/massgic/>
2. **Contact Information**

# Top of the Microsite - Enrollment Form & Quick Navigation



New employees will use this link to complete their enrollment within 21 days of hire.

New Hire Enrollment Form

\*Open Enrollment for the July 2026 plan year has closed. Only New Hires may enroll, and must do so within 21 days of their hire date.

Watch the tutorial video [here](#)

This guided tutorial walks through the enrollment form process.

These quick links help you quickly navigate to the desired information on the Microsite or take you to Ameriflex's searchable FSA eligibility list.

- Quick Navigation
- ▶ FSA
  - ▶ DCA
  - ▶ Filing a Claim
  - ▶ Contact Us
  - ▶ FSA Eligibility List

# Plan Information

## FSA (Previously HCFSAs)

### Flexible Spending Account (FSA Previously HCFSAs)

An FSA helps you manage both planned and unexpected out-of-pocket healthcare expenses using tax-free dollars. From routine health needs to unplanned medical costs, an FSA provides a reliable way to budget and save on care throughout the year.

When you enroll, you select how much you want to contribute, from \$250 to the annual IRS contribution limit. While your contributions are deducted from each paycheck over time, your full annual election is available at the start of the plan year, giving you immediate access to funds when you need them most.

You can use your FSA funds for a wide range of eligible medical expenses not covered by insurance. This includes expenses for **yourself, your spouse, your dependents, and any individual who qualifies as a "health plan tax dependent" under IRS guidelines.**

**FSA Contribution Limit: \$3,400**

#### Eligible Expenses

Your FSA funds can pay for expenses such as:

- Deductibles
- Copays
- Prescriptions
- Orthodontia
- Teeth cleaning
- LASIK
- Glasses and contact lenses
- Band-aids
- Sunscreen
- Over-the-counter medicine
- Feminine menstrual care

#### Relevant Links

- [▶ SIGIS Store Locator](#) [▶ Eligible Expenses](#)

# Plan Information

## DCA (Previously DCAP)

### Dependent Care Account (DCA Previously DCAP)

A DCA helps you pay for essential care services—such as daycare, preschool, and elder care—using pre-tax dollars, making these everyday expenses more affordable while lowering your overall taxable income. When you enroll, you can contribute up to the annual IRS limit. Unlike a Healthcare FSA, however, DCA funds are available only as they are contributed through your payroll deductions, rather than upfront at the start of the plan year. To simplify reimbursement for ongoing care expenses, you have the option to [set up a recurring dependent care claim](#) at the beginning of the year, allowing you to receive automatic reimbursements each pay period and reducing the need to submit repeated claims for regular services.

#### DCA Contribution Limits:

For single taxpayers OR married couples filing jointly: \$7,500  
For married couples filing separately: \$3,750

#### Dependent Care Criteria

Your DCA can be used to pay for eligible childcare and dependent care expenses for **children under the age of 13 or dependents who are physically or mentally unable to care for themselves**. To qualify, both you and your spouse must be working, actively seeking employment, or enrolled as full-time students. In addition, reimbursement amounts cannot exceed the earned income of you or your spouse—whichever is lower.

#### Eligible Expenses

DCA funds reimburse you for care that allows you to **work, attend school full-time, or search for employment**, helping you manage essential care costs while maintaining your daily responsibilities. Your DCA funds can pay for expenses such as:

- Tuition for a licensed daycare facility
- Elder care
- Preschool and nursery school
- Summer day camps
- Before-school and after-school programs
- In-home dependent care or nanny services

You may also refer to our [DCA Eligible Expenses list](#), a more complete resource on which expenses may be eligible or ineligible.

#### Relevant Links

- ▶ [Set Up a Recurring Dependent Day Care Claim](#)
- ▶ [What Expenses are Eligible for a Dependent Care Account \(DCA\)?](#)

# *Bottom of the Microsite - Forms & Additional Resources*

## Forms & Additional Resources

Below you will find additional resources for Participants and CIG Coordinators.

### Paper Forms

- ▶ [Letter of Medical Necessity](#)
- ▶ [Orthodontia Form](#)
- ▶ [DCA Recurring Claim Form](#)
- ▶ [Refund Request Form](#)
- ▶ [FSA Planning Worksheet](#)
- ▶ [Claim Form](#)

### Compliance Documents

- ▶ [FSA Plan Document](#)
- ▶ [FSA Summary Plan Description](#)

### Help Center Resources

- ▶ [Participant Webinars](#)
- ▶ [Plan Administrator Webinars](#)
- ▶ [Reimburse out-of-pocket Expenses](#)
- ▶ [Initial Account Setup](#)

### Helpful Resources

- ▶ [FSA Participant Handbook](#)
- ▶ [New User Guide](#)
- ▶ [Enrollment Tutorial Video](#)
- ▶ [FSA Presentation](#)
- ▶ [FSA Benefit 1-Pager](#)

**Paper Forms:** Contains important forms for employee use.

**Compliance Documents:** Contains the FSA Plan Document and Summary Plan Description.

**Help Center Resources:** Provides Help Center articles and recorded webinars that can further assist with both employer and employee account management.

**Helpful Resources:** Offers additional marketing assets, documents, and video tutorials for extra support.

# Your Client Account Manager

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## Jamey Romano

Client Account Manager

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### Phone

844.423.4636 x183

...

### Email

[james@myameriflex.com](mailto:james@myameriflex.com)

...

[Schedule a Call](#)

Jamey is the contact for Agency Coordinators only. He has been with Ameriflex since 2014. In his current role as Client Account Manager, he is responsible for providing the highest possible level of business growth and client satisfaction

Jamey has held several positions within Ameriflex in his 11 years including Account Coordinator, Account Executive, National Accounts Client Experience Specialist, Client Relationship Specialist, and now Client Account Manager. Jamey has built great relationships with his clients over the years and his strong work ethic has provided a positive experience for them. His various roles within the company have helped him to develop a deep understanding of our systems and processes that allows him to provide excellent service to our clients.

[Jamey Support Guide](#)

# Participant Services

For assistance with questions that cannot be resolved through the online portal, you can call our Participant Services Representatives. Our business hours are 8:00 a.m. – 9:00 p.m. EST Monday - Friday and Saturday from 10:00 a.m. – 2:00 p.m, EST

- They can be reached via [Live Chat](#) by going to [myameriflex.com](https://myameriflex.com), via email at [service@myameriflex.com](mailto:service@myameriflex.com), or by calling 888.868.3539 to speak with a live representative.
- Please note that hold times may be higher during peak times; you may wish to utilize our other service options if the hold is prohibitive.

# Payments and Tax Reporting

Jess Cogswell

Statewide Payments and Tax Reporting Officer

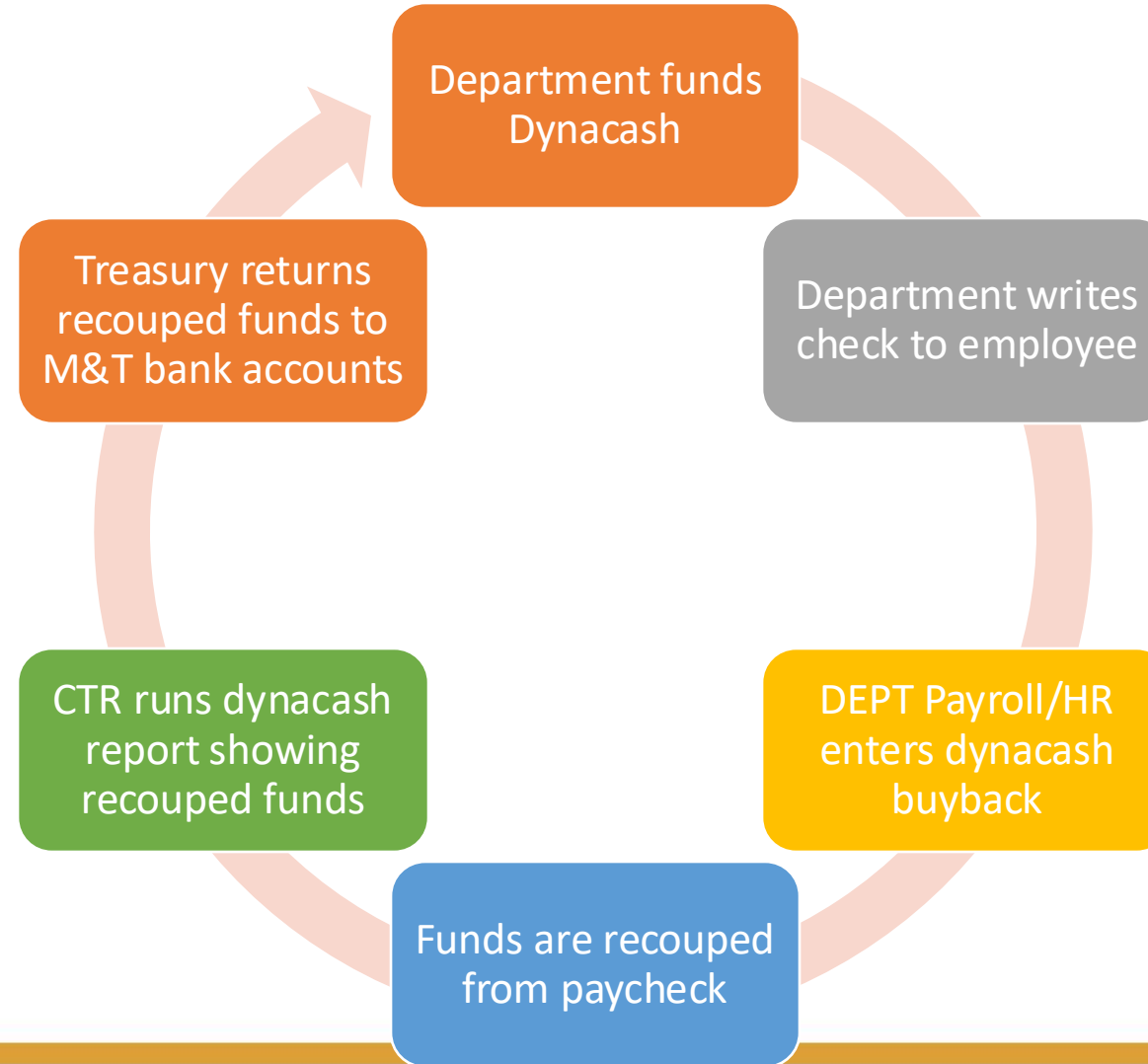
# What is dynacash?

- ★ **Dynacash is an emergency payroll payment mechanism**
- ★ **A checking account with M&T Bank**
  - Access is available through Treasury Center
- ★ **Recorded in Mosaic as an “Advance”**

# Why does my department need dynacash?

- ★ **MGL Chapter 149 section 148 - mandates that employees are paid within 6 days of the end of a pay period.**
- ★ **What happens if they are not paid? Underpaid?**
- ★ **What if a termination needs to occur?**
- ★ **What if an employee's bank account closed or was compromised?**
- ★ **The goal is to not use it, but in reality, things come up.**

# Dynacash Cycle



# HR/CMS Dynacash

# Dynacash Buyback

My Homepage Create General Deductions New Window | Personalize Page

**Create General Deductions**

Person ID [REDACTED]  
Company COM Commonwealth of Massachusetts

**General Deduction** | 2 of 10 | View All

\*Deduction Code  Dyna Cash Payback

**Deduction Details** | 1 of 1 | View All

\*Effective Date   Take on all Paygroups  
\*Calculation Routine   Ded stopped by Self Serv User  
Deduction End Date  Deduction Rate or %   
Loan Interest %  Flat/Addl Amount   
Goal Amount  Current Goal Balance

This data was last updated by \_\_\_\_\_ Data last updated on \_\_\_\_\_

# M&T Bank

# M&T Bank

- ★ **Departments have online access to their account but CTR is the administrator.**
- ★ **Reach out to CTR ([paymentsc@mass.gov](mailto:paymentsc@mass.gov)) for:**
  - Request/remove access
  - Add/remove signers
  - Order checks
- ★ **Do not go to a local branch for updates to dynacash accounts, they will redirect you to us**

# M&T Bank Functionality

- ★ **Users can install the PingID app for authentication or request a hard token**
  - CTR uses and recommends PingID
- ★ **All dynacash accounts have positive pay enabled, checks will only be honored if they are entered into Treasury Center**
- ★ **M&T functionality**
  - Enter “Issues” (checks)
  - Stop “Issues” (checks)
  - Download bank statements







# Enter an Issue

Home

Fraud/Risk

Add Widget

## Notifications

-  Starting 11/10: Previous Day Image Enhancements  
[More](#) 
-  Login Security Updates  
[More](#) 
-  **Cancel Stop Requests** await your approval. [View](#)
-  **Files** were recently imported. [View](#)

Check Issue Management



Check Issues/Voids

Imported Files

11/13/2023 11:50 AM

[Show Totals](#)

[+ Add Check Issue/Void](#)

[+ Import Check Issue/Void File](#)



# Enter an Issue (cont)

← Check Issue/Voids

Enter Issued Checks Show Optional Fields

<b>* From Account</b> - COMPTRROLLER EMERGEN... ▾	<b>* Serial Number</b> 5212	<b>* Date</b> 11/13/2023	<b>* Amount</b> 100.00 USD	Clear
<b>Payee Name</b> Commonwealth of Mass	<b>Memo</b> 			

Add  Issue(s)

Total of 20 Check Issues approved: 1 entered, 19 remaining.

# Best Practices

# Dynacash Best Practices

- ★ **Review payroll reports on Wednesday of payroll week**
  - This will identify if anyone is not paid or missing pay
  - This will give departments time to calculate and write dynacash check
  
- ★ **Have a procedure for hybrid work**
  - Where are the checks located? Are they secure?
  - Who can sign checks?
  - Who can enter checks in M&T?
  - Do you have coverage when a check needs to be written?
  - Are permissions updated when staff leaves?

# Dynacash Best Practices (cont 1)

- ★ **Enter Dynacash buyback within a day or two of writing the check**
  - Verify in HR/CMS it's been entered correctly
  - There is no such thing as negative dynacash
  
- ★ **Reconcile Account monthly**
  - Download statement
  - Verify checks have been cashed
  - Verify dynacash paybacks have been posted to account
  - Reach out to CTR if payback is missing

# Dynacash Best Practices (cont 2)

- ★ **Close out Dynacash account in a timely manner**
  - Don't wait until mid/late August
  - Avoid extra paperwork by closing it out before July 1<sup>st</sup>
  - If July 1<sup>st</sup> is not possible, have a plan to close out shortly after
  
- ★ **Dynacash checks over 1 year are stale**
  - Need to be returned to the Unpaid Check Fund
  - Email unpaid check fund for the procedure
  
- ★ **Don't Struggle**
  - Reach out for help, we've seen it all

# Want to Learn More?

- ★ Attend Closing/Opening Dynacash Bootcamp on June 11 at 10am.
- ★ Available in CTR LMS or by clicking [here](#)
- ★ Review your internal policies & procedures on Dynacash
- ★ Refresh yourself on the process with the on demand course "Dynacash Mid-Year Check In" also available in the CTR LMS
- ★ Reach out to CTR Payments and Tax Reporting Group – [paymentsc@mass.gov](mailto:paymentsc@mass.gov)



# BEST Program Update

HR/CMS User Group

June 10, 2026



## Topics

- ▶ Closing out Phase 2 Pre-Contracting Activities
- ▶ Summary of What We Heard
- ▶ Seeking to Address in Phase 2
- ▶ Four Stages to Prepare the Commonwealth for Workday
- ▶ Overview of Business Process Alignment (BPA) Approach
- ▶ Phase 2 PMO and Functional Lead Team

## From Agency Engagement to Enterprise Solution Design

### Broad Input and Engagement “Big Tent”

*Goal: Build broad awareness and engagement across the Commonwealth*

- Presented Phase 2 approach and overview across agencies and stakeholder groups
- Meetings with established HR/Payroll User Groups
- Ongoing collection and refinement of agency POCs, functional SMEs, and IT representatives

### Deep Agency-Specific Understanding

*Goal: Understand agency-specific workflows, tools, and operational challenges.*

- Devised an agency survey input on challenges, opportunities, and third-party solution usage (550+ response)
- Conducted 60+ agency baselining sessions on workflows, business processes, and operational needs
- Facilitated 24 functional listening sessions across Phase 2 solutions

### Agency Shared Problems Drive Enterprise Solutions

*Goal: Identify shared challenges and opportunities across agencies and cohorts.*

- Developed current-state analyses by function, agency, and agency cluster:
  - Pain points/Wish list/Opportunities
  - Operational complexity
  - Improvement opportunities
- Built understanding of current-state Payroll and HCM operations to inform BPA and future-state design

### Using Engagement, Listening, Data Collection and Analysis to Drive Enterprise Solution Design

- *Understanding of operational challenges unique to Agencies and Shared*
- *Information “at the ready” to support evidence-based functional requirement gathering*
- *Identification and validation of shared challenges allow for scalable (adoptable) enterprise solutions*
- *Seeding increased alignment across executive and non-executive agencies*

## We heard what is challenging for you today...

Throughout listening sessions, meetings and we heard about what's making HR & Payroll work challenging.

**Complex requirements result in timely additional process steps**  
Agencies with complex processes including 24/7 operations and nuanced employee populations require duplicate data entry, manual processes, or additional systems.

**Limited Self-Service Opportunities**  
Staff rely on HR for basic requests such as time off, address updates, pay stubs, creating bottlenecks for simple tasks.



### **Workflows burdened by manual & paper-based work**

Forms, spreadsheets and paper trails slow everything down – manual steps and long processing times are the status quo.

### **Limited Analytics Capabilities**

Employees across agencies agree that real-time reporting and customizable dashboards are a top priority. Current reporting relies on overnight runs, multiple data sources, and challenging data.

### **Burden of Compliance and Audit Tasks**

Tracking regulatory requirements across agencies is labor-intensive with inconsistent documentation and complex processes.

## Goal it to Address These Items in BEST Phase 2

Phase 2 Team and Accenture working to leverage Workday “best in class” Payroll and HCM Solutions to reimagine HR and Payroll processes.

### Digitized Payroll/HCM Workflows

Automated and digital workflows eliminate manual paper processes, improve submission, approval, and payroll processing times, and eliminate need for offline approvals.

### Integrated HR Platform Configurable to Agency Needs

Workday configuration will account for CBAs and agency-specific required processes as well integration with some current systems.

### Improved Employee and Manager Self-Service

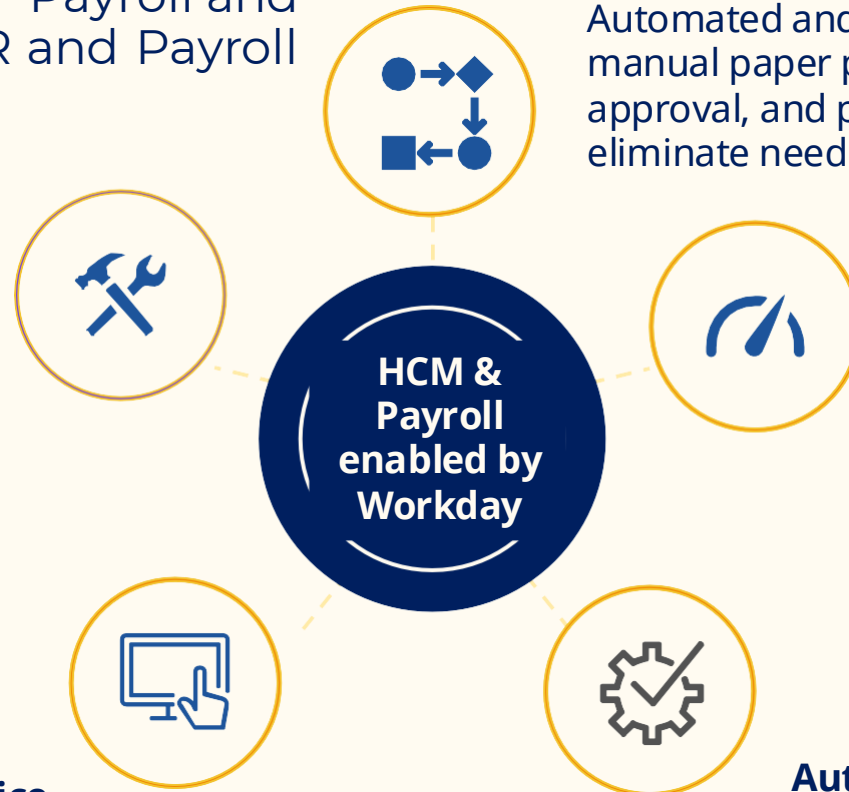
Availability of self-service processes lets employees update information, view their pay, and manage their learning, at any time.

### Enterprise Workforce Analytics

Ability to easily access accurate, real-time, and customizable reports on demand.

### Automated Rules and Compliance Logic

Automated compliance controls, clear audit trails, and configurable business processes ease the burden of audits and compliance tasks.



## Four Stages to Prepare the Commonwealth for Workday



### Business Process Alignment

- Understand current state and identify Workday areas of opportunity
- Engage with agencies and Commonwealth-wide stakeholders
- Establish go-live approach



### Build

- Design and configure business processes
- Build integrations, reports & dashboards



### Test

- Comprehensive system testing
- Simulate go-live processes



### Go-Live

- New system is live (phased deployments)
- Continued support for users in and outside of the system



### Change Management and Communications

- Communications and agency readiness
- Hands-on training and support resources
- Agency change network

## Overview of Business Process Alignment (BPA) Approach

BPA includes many functional workshops in the following progression.



*We are here*

### Day in the Life (DITL)

For each functional area, develop a shared understanding of how work gets done today by documenting current state activities, roles, and decision points.

### Get to Know BEST (GTKB)

Provide an overview of BEST Phase 2, demo key Workday features, outline upcoming sessions and how agencies will be engaged.

### Business Process Overview (BPO)

For each functional area, illustrate how Workday supports business processes and highlight key differences, opportunities, and impacts.

### Look back on BPA

Sessions to “look back” on BPA, sharing highlights, and reviewing some of the objectives and concerns raised in the introduction sessions and how they have been addressed.

### Alignment Opportunities

Prioritize alignment decisions, confirm process design direction, and resolve open questions.

## Phase 2 PMO and Functional Lead Team

**BEST Program Management Office**  
[Transformation\\_PMO@mass.gov](mailto:Transformation_PMO@mass.gov)  
[best.macomptroller.org](http://best.macomptroller.org)

**Helen O'Malley**  
BEST Program Manager  
[Helen.OMalley@mass.gov](mailto:Helen.OMalley@mass.gov)



**Michael Kelleher**  
Phase 2 Project Manager  
[Michael.Kelleher6@mass.gov](mailto:Michael.Kelleher6@mass.gov)



**Kerrie Coleman**  
Phase 2 Procurement Lead  
[Kerrie.Coleman@mass.gov](mailto:Kerrie.Coleman@mass.gov)



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

**Sam Moy**  
Time and Attendance Functional  
Lead  
[sam.moy@mass.gov](mailto:sam.moy@mass.gov)



**Robin Anastasio**  
Payroll Functional Lead  
[Robin.Anastasio1@mass.gov](mailto:Robin.Anastasio1@mass.gov)



**Tsui Cheng**  
Personnel Administration Team  
Lead  
[Tsui.Cheng@mass.gov](mailto:Tsui.Cheng@mass.gov)



**Human Capital Management  
(HCM)**

**Bill Weiss**  
HCM Functional Lead  
[Bill.J.Weiss@mass.gov](mailto:Bill.J.Weiss@mass.gov)



**Dan Miguel**  
Talent Acquisition & Onboarding  
Lead  
[Daniel.Miguel@mass.gov](mailto:Daniel.Miguel@mass.gov)



**Denise Martin**  
Learning Management Lead  
[Denise.Martin@mass.gov](mailto:Denise.Martin@mass.gov)



**Phase 2 Business Analysts**

**Tim Owens**  
Time & Attendance  
Business Analyst  
[Timothy.Owens@mass.gov](mailto:Timothy.Owens@mass.gov)



**Robert Dionne**  
HR Generalist  
Business Analyst  
[Robert.Dionne1@mass.gov](mailto:Robert.Dionne1@mass.gov)



**Pamela DiGirolamo**  
Collective Bargaining Agreement  
Analyst  
[Pamela.DiGirolamo@mass.gov](mailto:Pamela.DiGirolamo@mass.gov)



**Christian Carde Guzman**  
HR Generalist  
Business Analyst  
[Christian.Carde@mass.gov](mailto:Christian.Carde@mass.gov)



**Megan Joyce**  
HR Generalist  
Business Analyst  
[Megan.Joyce@mass.gov](mailto:Megan.Joyce@mass.gov)



**Divya Nama Alexander**  
HR Generalist  
Business Analyst  
[Divya.Alexander@mass.gov](mailto:Divya.Alexander@mass.gov)



Thank you!





# Massachusetts Deferred Compensation SMART Plan

Payroll Users Group Meeting

June 10th, 2026

# SMART Plan Agenda

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- New Reduced Plan Fees
- Special Catch-up Procedure
- Plan Enrollment Code
- Outdated Material
- New Retirement Plan Advisor



## Full-Time Plan

For Participant Accounts with a balance **under \$1,000.00:**

- Basic Plan Administration Fee is **2.5 basis points**, reduced from 7 basis points

For Participant Accounts with a balance **greater than or equal to \$1,000.00:**

- Basic Plan Administration Fee is **\$5.00 per Participant account per year**, reduced from \$10 per year
- Plus an **additional 2.5 basis points**, reduced from 7 basis points

*Total fees **not to exceed \$125.00 per Participant per year**, reduced from \$350 per year*

*Unchanged is an annual administration fee of 0.75 basis points (0.0075%) of account balances which is charged on a monthly basis.*



## OBRA Mandatory

For Participant Accounts with a balance **under \$1,000.00:**

- Basic Plan Administration Fee is **\$10.00 per Participant account per year**, reduced from \$12 per year

For Participant Accounts with a balance **greater than or equal to \$1,000.00:**

- Basic Plan Administration Fee is **\$12.00 per Participant account per year**, reduced from \$14.40 per year
- Plus an additional **10 basis points**, reduced from 13.825 basis points

*Total fees **not to exceed \$100.00 per Participant per year**, reduced from \$125 per year*

# Special Catch-up Procedure



- 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*
- Note: Cannot be in special catch-up if over age 70 1/2 (as stated in plan document)

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

<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>	<b>7</b>	<b>8</b>	<b>9</b>	<b>10</b>	<b>11</b>
Hire Date	Before Tax	50 +	Roth	Hardship End Date	Accelerated Code	Deferral End Date	Amount	Deferral Change Time Stamp
10/27/2008	940.00\$	Y						01/22/2023
02/21/2006	175.00\$	Y			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

- 2026 Special Catch-up Limit = \$24,500 (\$49,000 total)

# Special Catch-up Procedure (continued)



- Enter amount in Savings Management Panel
  - Catch-up amount ONLY (total amount minus \$24,500)
  
- Do not enter/change an amount without notification from Empower
  - Refer to Deferral File
  - Will include an End Date
  
- Will need to re-enter for each of the 3 years
  
- If annual limits increase per IRS, do not automatically increase in HRCMS
  - Actual limit still based on employee’s catch-up credit amount



Limit Exceptions

*Company	*Calendar Year ↓	*Limit Type ↓	*Exception Reason	Description	Extension Election	Adjustment Amount	Limit Amount Override	457 Adjust	Updated on
COM	2027	457	A	Catch Up - Extend Limit	<input checked="" type="checkbox"/>	24,500.00		457 Adjust	02/03/2026
COM	2026	457	B	Age - Extend Limit	<input checked="" type="checkbox"/>	8,000.00			12/27/2025
COM	2026	402(g)	B	Age - Extend Limit	<input checked="" type="checkbox"/>	8,000.00			12/27/2025
COM	2026	457	A	Catch Up - Extend Limit	<input checked="" type="checkbox"/>	24,500.00		457 Adjust	02/03/2026
COM	2025	457	B	Age - Extend Limit	<input checked="" type="checkbox"/>	7,500.00			12/28/2024
COM	2025	402(g)	B	Age - Extend Limit	<input checked="" type="checkbox"/>	7,500.00			12/28/2024
COM	2025	457	A	Catch Up - Extend Limit	<input checked="" type="checkbox"/>	23,500.00		457 Adjust	11/05/2025

# Special Catch-up Procedure (continued)



- More info available in the updated Payroll Guide
- Can request a copy via the SMART email alias: [SMART@Empower.com](mailto:SMART@Empower.com)



Deferral recordkeeping allows participants in the Massachusetts Deferred Compensation SMART Plan (SMART Plan) to make deferral changes via the automated voice response system or the website. With deferral recordkeeping, you do not need a paper form to make deferral changes. To make participant deferral changes, you now submit a monthly file to the department's designated primary contact for updating in HR/CMS via the Empower Plan Service Center (PSC).

Understanding how to access and utilize the deferral file is important because it provides a quick and easy method for payroll administrators to collect deferral change information for SMART Plan participants.

This guide answers payroll administrators' most frequently asked questions about how to access and utilize the deferral file.'

**Q: How will Empower notify me that a participant has made a change to their deferral amount?**  
**A:** Empower will send participant deferral changes to your organization's designated contact(s). Your designated contact(s) will then receive an auto-generated email notification that the deferral file is available. The email will also include instructions on how to access the deferral file via the PSC. On the first business day of each month, your designated contact(s) will need to log in to the PSC to retrieve the deferral file for the prior month.

- Q: How do I log in to the PSC?**  
**A:** 1. Go to [www.mass-smart.com](http://www.mass-smart.com). Click on the *Plan Sponsor Center* link in the upper right corner.  
2. Enter your username and password.  
If you do not have or cannot remember your username and password, please call the Plan Sponsor Line at **800-695-4952** to speak with a PSC representative.  
3. Enter the plan number that you wish to access.

Plan Number	Plan Name
98966-01	Massachusetts Deferred Compensation SMART Plan
98966-02	Massachusetts Deferred Compensation SMART Plan – Mandatory OBRA
98966-03	Massachusetts Deferred Compensation SMART Plan – Voluntary OBRA

Please note: You will have inquiry or view-only access in the PSC.



FOR PLAN SPONSOR USE ONLY. Not for Use With Plan Participants.

# Plan Enrollment Code



- Updated as of June 1, 2026
- Flyer can be found on the Plan Service Center:
  - Participants > Employee Forms
- Employees can also access via the Enroll Now page on the SMART website

The screenshot shows the SMART Plan Service Center interface. The breadcrumb trail at the top reads: Home / Massachusetts Deferred Compensation SMA... - 98966-01 / Plan Summary. A search bar is located at the top right with the text "Search Plan or Participants" and a "Go" button. The left navigation menu includes: Dashboard, PartnerLink, Plan Summary, Action Center, Plan, Participants (highlighted with a red box), Search employee, Employee forms (highlighted with a red box), Upload documents, Plan messaging, Email address updates, Reports, Fiduciary Center, Administration, Contacts, File Sharing, and Help Center. The main content area features two "IMPORTANT" notices. The first notice states: "The Plan Service Center(PSC) brings audit resources into one place, allowing auditors to request audit packages, access documents, and submit inquiries through Empower Case Management. An authorized signer can review update or grant access through the Contacts menu on the PSC connecting auditors directly with Empower. For an overview of 5500 plan audits and the resources available to help your plan complete this task efficiently, join one of our live webinars." The second notice states: "Important Information On October 22, 2025, an email went out notifying SMART plan payroll contact that their banking information will need to be updated before submitting the first payroll remittance after December 1, 2025. The new banking information can be found here. We appreciate your attention to this matter and partnership in ensuring timely funding of contributions. If you have any questions or concerns, please contact Empower at 800-695-4952 or by email at MassServiceTeam@empower.com." At the bottom, there is an "Action center summary" section with a "Create a case" button and a "Case management" section with a notification badge "1" and buttons for "View completed cases" and "View all open cases".

# Out-Dated Material



- Please check dates
- Older forms may be rejected
- All current forms/material available on the website and Plan Service Center
- Provide employees with website link

I elect to contribute \$ \_\_\_\_\_ or \_\_\_\_\_% (do not complete both) (up to \$23,500.00 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 \$23,500.00 o de 1% a 100%) por periodo 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 /	Day /	Year /
Mez /	Día /	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 periodo 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 - \$23,500.00 or 1% - 100%) / A un monto máximo de \$ \_\_\_\_\_ o \_\_\_\_\_% por cheque de nómina (\$10.00 a \$23,500.00 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 - \$23,500.00 or 1% - 100%) / A un monto máximo de \$ \_\_\_\_\_ o \_\_\_\_\_% por cheque de nómina (\$10.00 a \$23,500.00 o 1% a 100%)  
Select the increment to increase annually \$ \_\_\_\_\_ or \_\_\_\_\_% / Seleccione el incremento para aumentar anualmente \$ \_\_\_\_\_ o \_\_\_\_\_%

**GWRS FENRAP 01/15/25**  
**GWRS FENRAP 15/01/25**

98966-01

ADD NUPART

DAESMANUAL/SP110200E1  
Page 1 of 0 / Página 1 de 0



### Is a SMARTPath target date fund right for you?

Choose a professionally managed, diversified portfolio in one simple step.



### Important information for OBRA participants

Learn more about the OBRA plan, updates, and resources.



### For your protection

Take a look at these security tips and best practices.

Securities, when presented, are offered and/or distributed by Empower Financial Services, Inc., Member FINRA/SIPC. EFSI is an affiliate of Empower Retirement, LLC, Empower Funds, Inc., and registered investment adviser, Empower Advisory Group, LLC. This material is for informational purposes only and is not intended to provide investment, legal or tax recommendations or advice.

**Need Help?**  
To speak with a representative regarding your account, [contact us](#) Monday - Friday

# SMART Retirement Plan Advisors Page



## ■ Introducing Cole Frederick Parts of Western/Central MA



■ All RPA's listed on website; click for your RPA

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

[www.mass-smart.com](http://www.mass-smart.com) >  
Plan Resources >  
Find your Representative

■ Look for QR code in June newsletter for RPA availability

■ Office locations in Waltham and Springfield



Cape Ann Harbor at dawn

### MAKE THE MOST OF SUMMER HOURS - CONSIDER CONNECTING WITH YOUR LOCAL SMART PLAN RPA

Summer can be an excellent time to review your retirement strategy and take advantage of the resources available through the SMART Plan.

Whether you're just getting started, approaching retirement or already retired, a Retirement Readiness Review can help you better understand where you stand today and identify opportunities to strengthen your future plans.

#### A RETIREMENT READINESS REVIEW CAN HELP YOU:

- ✓ Better understand your current retirement progress
- ✓ Review savings and contribution strategies
- ✓ Discuss investment allocation considerations
- ✓ Explore retirement income planning concepts
- ✓ Identify action items aligned with your goals

Taking time now can help you stay on track for the future you envision.

Investing involves risk, including possible loss of principal.  
Point-in-time advice is provided by an Empower representative registered with Empower Financial Services, Inc., at no additional cost to account owners and may include savings, investment allocation, distribution, and rollover advice, including advice on consolidating outside retirement accounts. There is no guarantee provided by any party that use of the advice will result in a profit.  
The Retirement Readiness Review is provided by an Empower representative registered with Empower Financial Services, Inc. and may provide tailored retirement education and guidance at no additional cost to participants.  
**Securities, when presented, are offered and/or distributed by Empower Financial Services, Inc., Member FINRA/SIPC.** EFSI is an affiliate of Empower Retirement, LLC, Empower Funds, Inc., and registered investment adviser Empower Advisory Group, LLC. This material is for informational purposes only and is not intended to provide investment, legal, or tax recommendations or advice.  
Online Advice and My Total Retirement are part of the Empower Advisory Services suite of services offered by Empower Advisory Group, LLC, a registered investment adviser. Past performance is not indicative of future returns. You may lose money.  
"EMPOWER" and all associated logos and product names are trademarks of Empower Annuity Insurance Company of America.

#### RESOURCE



#### How to Schedule A Meeting With Your Local SMART Plan RPA

Prefer to schedule online? Scan the QR code or visit the [scheduling page](#).

You can also access the page by visiting [www.mass-smart.com](http://www.mass-smart.com) and select [Plan Resources](#) and then [Find your representative](#).

## Choose your Retirement Plan Advisor (RPA)

DO 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](mailto:SMART@Empower.com)

**Thank you**

# Trending Topics

Evanice Henniger

Director of Business Partner Engagement

# ServiceNow

## ★ HR/CMS EOTSS ServiceNow

Executive Office of Technology Services and Security (EOTSS)

Search

Hi Evanice, looks like you have 4 open tickets, Select "My stuff" to view the latest.

You can also submit an Incident, browse the Service Catalog, or Live Chat with a member of the Service Desk.

- My Stuff**  
View your open Incidents and Requests, previous history, pending Approvals and more.  
Open Items: 4  
Pending Approvals: 0
- Submit an Incident**  
Something you currently have is broken, or not working as expected.  
You received an error message.
- Service Catalog**  
Request IT products and services.  
Not sure what you need, or can't find it in the Catalog? Email the Customer Engagement team for guidance.
- End User Chat**  
Chat with a member of the Service Desk to get immediate assistance.  
[Chat now](#)

## ★ Mosaic/LCD CTR Solution Desk

Office of the Comptroller

Log in

[Submit a Ticket](#)  
Contact the CTR Solution Desk for assistance

### About the CTR Solution Desk

We offer technical assistance and resources for Mosaic, the CTR Learning Center, PowerDMS, DocuSign for CTR forms, and more.

We value our customers and respond to all inquiries within 24-48 hours. Please do not submit multiple tickets on the same issue, as this will delay our response to you.

- Mosaic Resource Library**  
Everything you need to succeed in Mosaic
- Close/Open Calendar**  
Resources to help Commonwealth of Massachusetts departments navigate the closing of Fiscal 2026 and opening of Fiscal Year 2027.
- Resources on PowerDMS**  
CTR job aids, policies, and reference documents
- CTR Statewide Learning**  
State finance training and course catalog

Monday - Friday | 9:00am - 4:30pm  
<https://www.macomptroller.org/>

# Solution Desk

The screenshot shows the 'Solution Desk' website for the Office of the Comptroller. The header is dark blue with the office logo and name on the left, and 'Ticket' and 'Tours' links on the right. Below the header is a breadcrumb trail: 'Home > Solution Desk > Support'. A search bar labeled 'Search Catalog' is on the right. On the left, a 'Categories' sidebar has 'Support' selected. The main content area is titled 'Support' and contains six service tiles arranged in a 2x3 grid. Each tile has a title, an icon, a description, and a 'View Details' link.

Office of the Comptroller SOLUTION DESK

Ticket Tours

Home > Solution Desk > Support


Search Catalog

Categories

- Support

### Support


#### [Contact the Solution Desk](#)



For assistance with Mosaic, PowerDMS, the CTR Learning Center, E-Signatures, or CTR policies and procedures. NOTE: Submitting multiple tickets on the same issue will delay our response.

[View Details](#)


#### [DSO Security Questions](#)



Department Security Officers (DSOs) or Backup DSOs can contact the Office of the Comptroller regarding a UDOC, Vendor SharePoint access, user roles, security reports, and more.

[View Details](#)


#### [LCD / Payroll Request](#)



Submit a ticket for assistance with adjustments, distributions, funding and/or budgeting as well as for general assistance with transactions or screens within Labor Cost Distribution

[View Details](#)


#### [Password Reset](#)



Request a Password Reset for CTR systems

[View Details](#)


#### [Table Change Request](#)



Request to Add, Change, or Delete a Mosaic table

[View Details](#)

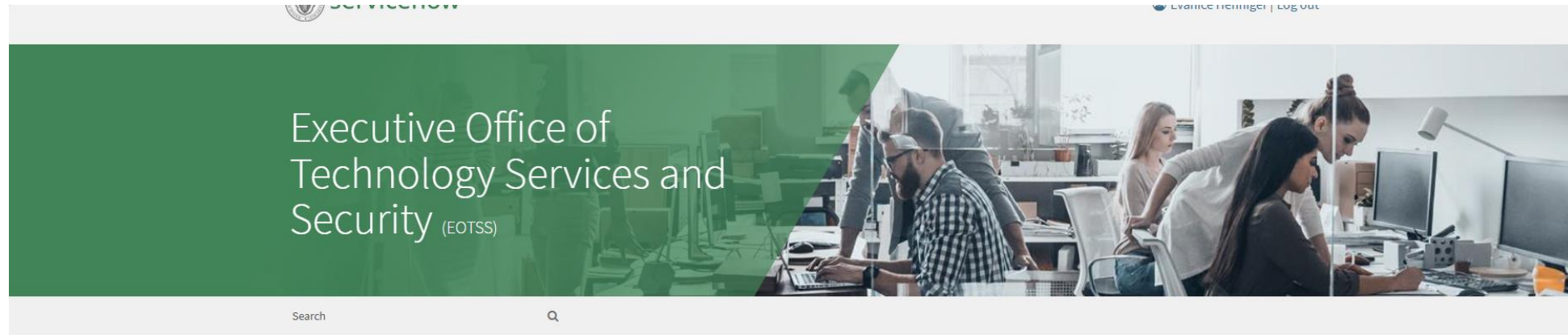
#### [Interface Request](#)



Mosaic Interface Request - Complete this form for all new interface requests or recertifications




[View Details](#)

# HR/CMS EOTSS ServiceNow



Hi Evanice, looks like you have 4 open tickets, Select "My stuff" to view the latest.
















You can also submit an Incident, browse the Service Catalog, or Live Chat with a member of the Service Desk.

 <p><b>My Stuff</b></p> <p>View your open Incidents and Requests, previous history, pending Approvals and more.</p> <p>Open Items: 4</p> <p>Pending Approvals: 0</p>	 <p><b>Submit an Incident</b></p> <p>Something you currently have is broken, or not working as expected.</p> <p>You received an error message.</p>	 <p><b>Service Catalog</b></p> <p>Request IT products and services.</p> <p>Not sure what you need, or can't find it in the Catalog? Email the Customer Engagement team for guidance.</p>	<p><b>End User Chat</b></p> <p>Chat with a member of the Service Desk to get immediate assistance.</p> <p><a href="#">Chat now</a></p>
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# Service Catalog Categories








## Categories

Browse the catalog by category, select and complete the form and submit your request. Categories are displayed based on your access within the catalog.

 Access Management	 Application Services	 Communication & Network Services	 Data & Digital Services
 Data Center Services	 Database Services	 Hardware & Asset Management	 Hosting
 HRCMS Services	 MassGIS	 Professional Services	 Security and Risk
 Software Services	 Strategy Consulting	 Support Services	

# HR/CMS Categories

## HRCMS Services

Access Management	 <a href="#">HRCMS Audit</a>	This is to request an HR/CMS audit.
Application Services	 <a href="#">HRCMS HR</a>	This is to request HR/CMS service related to HR components.
Communication & Network Services	 <a href="#">HRCMS Payroll</a>	This is to request HR/CMS service related to payroll components.
Data & Digital Services	 <a href="#">HRCMS Security</a>	This is to request HR/CMS service related to any security issues.
Data Center Services	 <a href="#">HRCMS Service</a>	Request HRCMS service for HR, Payroll, Time and Labor, ePay/eProfile, and Mass Updates.
Database Services	 <a href="#">HRCMS Time &amp; Labor</a>	Request HRCMS services related to Time and Labor components.
Hardware & Asset Management	 <a href="#">HRCMS Time Collection Device (TCD)</a>	This is to request HRCMS service related to Time Collection Devices (TCDs).
Hosting		
<b>HRCMS Services</b>		
MassGIS		
Professional Services		
Security and Risk		
Software Services		
Strategy Consulting		
Support Services		

# HR/CMS Categories Details

- ★ **HR/CMS Audit** - This service will provide users support in HR/CMS for all audit functions. These services are provided to all Executive Departments, Legislative, Judicial, Independent and Constitutional offices.
- ★ **HR/CMS HR** - This service will provide users support in HR/CMS for Position Management and HR Transactions. These services are provided to all Executive Departments. All Legislative, Independents, Constitutional, Sheriffs, Higher Education, Judicial, and MBTA requests must be submitted to HR/CMS Payroll.
- ★ **HR/CMS Payroll** - This service will provide users support in HR/CMS for all Payroll related matters. These services are provided to the Executive, Judicial, and Legislative branches of government as well as Higher Education, MBTA and all Independent and Constitutional offices. Additional Pay, Direct Deposit, Employee Tax Data, General Deduction Data, Paycheck, Pension/Retirement. **All** Higher Education, Judicial, and MBTA requests are to be submitted to HR/CMS Payroll. These Services are provided to all departments.

# HR/CMS Categories Details

- ★ **HR/CMS Time & Labor**- Users may request support for HRCMS Time and Attendance matters, including Assign Work Schedule, Comp Plan Enrollment, Leave Balance Issues, Time Reporter Data, Timesheet, View Compensatory Time, etc. These services are provided to all Executive Departments. All Legislative, Independents, Constitutional, Sheriffs, Higher Education, Judicial, and MBTA requests must be submitted to HR/CMS Payroll.
- ★ **HR/CMS Time Collection Device**- This service will provide users support in HRCMS for all Time Collection Device matters (Time Clocks, Badges, Connections). These services are provided to all departments.

# Do's and Do Not's

- ★ Reach out whenever you have an issue, problem, concern
- ★ Executive departments log tickets with HR/CMS HR
- ★ Constitutional/Independent and non-Executive log tickets with HR/CMS Payroll
- ★ Escalate the issue to management, if necessary

- ★ Log the same issue in multiple systems
- ★ Email members of the Statewide Payroll Team directly
- ★ Wait!!

# Questions?



**METRO**  
CREDIT UNION



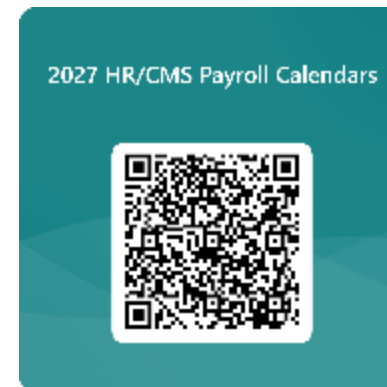
# June 2026 Updates



# **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
  - **Must Complete form by July 31<sup>st</sup>, 2026**

Next Steps

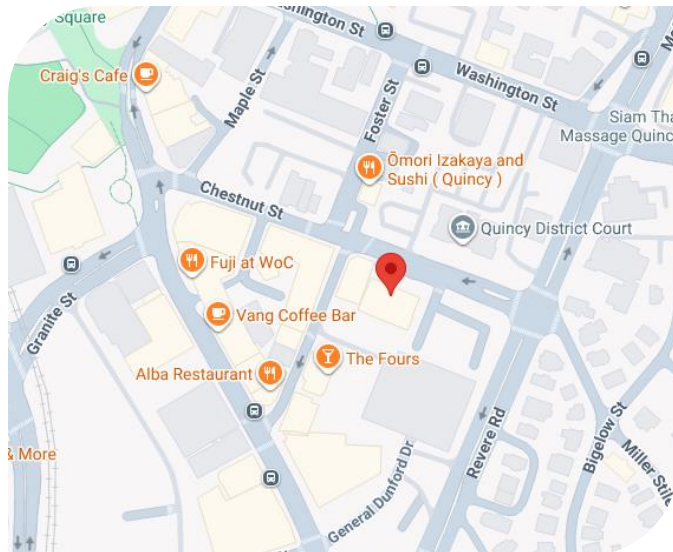




# Upcoming Branch Changes

## Quincy Branch

- Opening in late 2026
- 1 Chestnut St



## Peabody – Main St

- Closing Soon
- Peabody – Andover St still open
  - <10 min drive

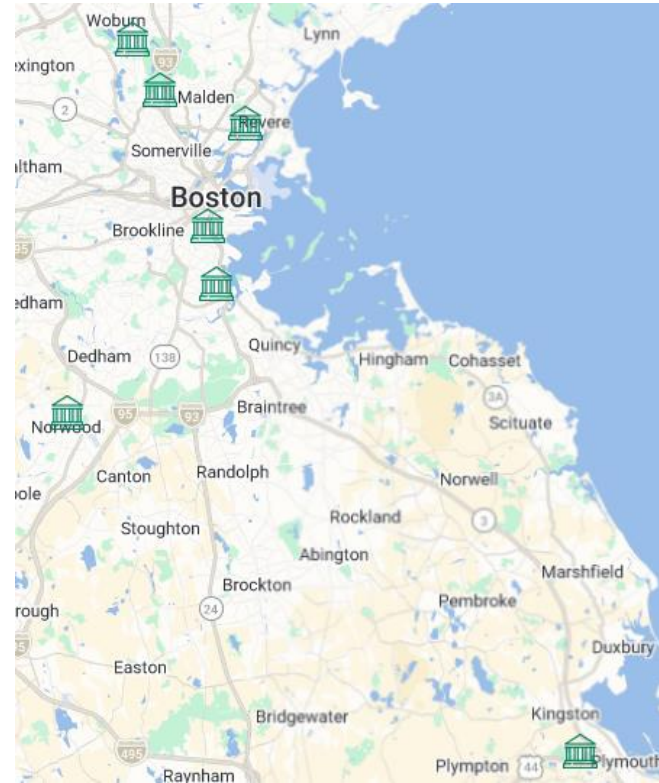
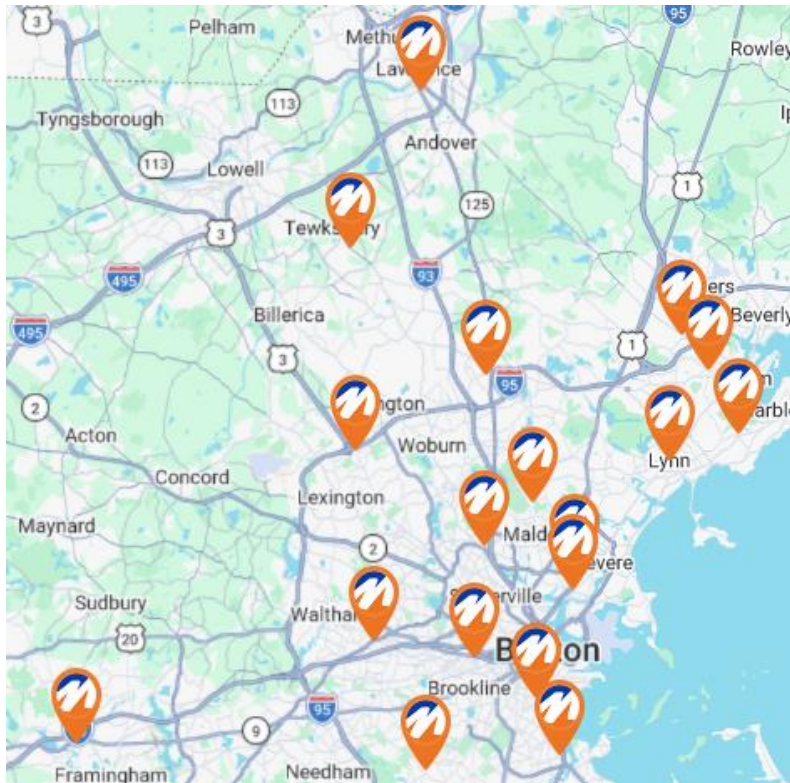


# Powered By Partnership



- Announced early April
- Pending Approvals – Late 2026

- Expanded Access
  - 25 Branches





# Financial Wellness Seminars

- More than 20+ topics
  - Basics of Personal Finance
  - Build a Basic Budget
  - Understanding Credit
  - Debt Management
- 30-minute & 60-minute versions
- Offered in-person and virtually





# Tentative - Ask The Experts Day

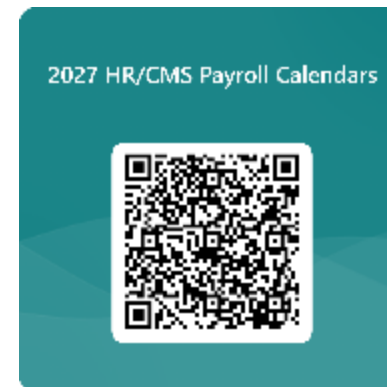
- **Where:** Main Level, Ashburton Place
- **When:** Wednesday, August 12<sup>th</sup> or Tuesday, August 18<sup>th</sup>
- **Time:** 11:00am – 2:00pm
- **Who:** Michael Friedman (Student Lending), Deb Frank (Mortgages) Barbara Quin (Investment Services)



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Next Steps





## Dedicated Resource



### **Brandon Williams, CCUFC**

Metro@Work Relationship Manager

E: [BWilliams@MetroCU.org](mailto:BWilliams@MetroCU.org)

O: 877.MY.METRO ext. 5408

C: 781.823.9685

# Resources & References

# Reference Resources

- ★ [Close/Open 2026-2027 - Office of the Comptroller Intranet](#)
- ★ [CTR Learning and Solution Hub - CTR Employee Central](#)

# 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**

★ Please log a ticket so that an available analyst can be assigned

★ Please do not log the same issue in both systems

★ Do not email problems, questions, concerns to a member of the Statewide Payroll Team

# Thank you

Next meeting September 9, 2026