



AG Call
August 13, 2019

Agenda:

- BN: ABE Workshops
Self-Service
- PY: Tax Reform
- UW SHR: Rehired Annuitant Sick Leave Certification
Rehired Annuitant Form
Wellness Incentive
- UW SS: HRS Administration Website Transition

- Institutional Feedback

BN: ABE Workshop – Save the Date

- Tuesday, September 17, 2019
 - ETF It's Your Choice: 9 a.m. to 12 p.m.
 - Where:
 - Alliant Energy Center, Madison WI
- Thursday, September 19, 2019
 - UW SHR Policy and Plan Review: 10 a.m. to 12 p.m.
 - UW SC ABE Workshop: 1 p.m. to 3 p.m.
 - Where:
 - Room 217 A&B, 660 W. Washington Ave, Ste 201, Madison WI 53703
 - Blackboard Collaborate will be available
- Thursday's training will cover the following:
 - Plan updates and policy changes
 - System improvements
 - Open Enrollment 101:
 - Refresher on Self Service enrollment and ADM event entry
 - Review timeline for enrollment entry and auditing

BN: HRS & ABE Outages

- No HRS Entry:
 - September 27-28: Open Enrollment Opening Weekend
 - October 26-27: Open Enrollment Closing Weekend
- A communication will be sent out when the process has completed and the system is available for institutional use

BN: ABE Reminder – Security Compliance

- Employees who have HRS access are required to complete a security awareness test at hire and again annually.
- If an account becomes locked, employees will not be able to use ABE Self Service until the test is passed and their account is unlocked.

Questions?



PY: Tax Reform

- The Treasury Department and the IRS are working to incorporate changes into the Form W-4, Employee's Withholding Allowance Certificate, for 2020
- The current [2019 version of the Form W-4](#) is similar to last year's 2018 version

PY: Tax Reform (cont'd)

- For the current 2019 tax year, the IRS continues to strongly urge taxpayers to review their tax withholding situation as soon as possible to avoid having too little or too much withheld from their paychecks. To perform a quick "[paycheck checkup](#)," use the IRS withholding calculator.
- Use this link to view the [draft of the 2020 W-4](#) (pdf).

PY: Draft Form W-4 2020

**Step 2:
Account
for Multiple
Jobs**

Caution: The correct amount of withholding depends on income earned from all jobs in the household. If you:

- Hold more than one job at a time, or
 - Are married filing jointly and both you and your spouse work,
- account for this below or you may owe additional tax when filing your tax return.
(If you and/or your spouse have income from self-employment, see page 2.)

- 2 Multiple jobs.** Do **only one** of the following.
- Use the calculator at www.irs.gov/W4App for most accurate withholding; **or**
 - Use Worksheet 1 on page 3 and enter the result on line 4c below for roughly accurate withholding; **or**
 - If there are only two jobs in your household, you may check here. Do the same on Form W-4 for the other job. With this option, more tax than necessary may be withheld from your wages, but you generally won't have too little tax withheld

Complete lines 3 through 4b on Form W-4 for only one job in the household. (Your withholding will be most accurate if you do this on the Form W-4 for the highest paying job.)

Step 3: Claim Dependents	3 Dependents. If your income will be \$200,000 or less (\$400,000 or less if married filing jointly) (see instructions):		
	<ul style="list-style-type: none"> • Multiply the number of qualifying children under age 17 by \$2,000 ▶ \$ <input type="text"/> • Multiply the number of other dependents by \$500 ▶ \$ <input type="text"/> Add the amounts above and enter the total here	3	\$ <input type="text"/>
Step 4: Other Adjustments (optional)	4a Other income. If you want tax withheld for other income you expect this year that will not have withholding, enter the amount of other income here. This may include interest, dividends, and retirement income. You should not include income from any jobs . . .	4a	\$ <input type="text"/>
	b Deductions. If you expect to claim deductions other than the standard deduction and want to reduce your withholding, use Worksheet 2 on page 3 and enter the result here	4b	\$ <input type="text"/>
	c Enter any additional amount you want withheld each pay period	4c	\$ <input type="text"/>
	d Exemption. You can claim exemption from withholding for 2020 if: <ul style="list-style-type: none"> • For 2019, you had no federal income tax liability; and • For 2020, you expect to have no federal income tax liability. If you meet both of these conditions, certify by writing "Exempt" here ▶	4d	<input type="text"/>

PY: FAQs on the early release Form W-4

- <https://www.irs.gov/newsroom/faqs-on-the-early-release-of-the-2020-form-w-4>
- Includes 20 questions highlighting:
 - Why?
 - What happened to withholding allowances?
 - Is everyone required to submit a new W-4?
 - Individual employee questions
 - Employer FAQs

PY: Self-Service Form W-4

- Go-Live is anticipated early in 2020
- Employees can still use manual paper forms
- Hire packet will be available via self-service including:
 - Form W-4
 - Ethnicity
 - Disability
 - Veteran Status
 - Other personal information
- Form W-4 can be accessed via self-service as a separate form, if applicable
- Individuals, such as non-resident aliens, will not be able to access the self-service form

PY: Campus Input Request

- Do you have business processes at your institution that use information found in the new hire packet documents for entry in HRS? Please identify these processes.
- What information on the UW custom W-4 form is being used to update/review pages in HRS other than the tax data pages?
- Do you have any concerns about separating the Form W-4 page from the New Hire Packet?
- Please identify and submit to your Affinity Group a point of contact at your institution to represent Payroll and HR on this project.

Questions?



Rehired Annuitant Sick Leave Certification

- ETF recently notified UW System HR that rehired annuitants who earn sick leave while not actively participating (contributing to) the WRS will no longer be eligible to have the sick leave certified under the Sick Leave Credit Conversion Program.
- UW System HR is actively working with UW System Administration leadership and ETF on options to minimize the impact to affected employees and the UW System.
- Additional information will be provided as the details are worked out.
- UW System Administrative Policy 1212 (formerly BN 3) Sick Leave (section 4.A.(5)(e) is under review and will be updated.
- Contact UW System HR at uwshr@uwsa.edu with questions.

Rehired Annuitant Form

- Use the most current Rehired Annuitant Form (ET-2319) (revised 7/2/2019).
 - **Institution:** Complete the Employer section. Verify the information in the Employer section matches what will be or is in HRS.
 - **Employee:** Complete the Employee section and box 1 or box 2, sign, date, return to human resources office within 7 days of returning to work.
 - **Institution:** For timely processing, fax the form (do not mail) to the Service Center at (608) 890-2194.
 - **Service Center:** Sign as WRS agent and submit to ETF.

Note: Institution HR office or Benefits Administrator is not a WRS agent.

Rehired Annuitant Form

Reminders:

- For employees who elect to actively participate in WRS:
 - **Institution:** Enter benefit elections in HRS after confirmation of the effective date is received from the Service Center. Also, on UW Benefits tab (Job Data), leave rehire annuitant as “No WRS” until confirmation is received.
 - **Receipt Date at ETF:** The Rehired Annuitant Form receipt date at ETF determines the WRS effective date and all insurance benefits. The employer and employee sections must be complete and the form must be signed by a WRS agent.
 - **Resources:**
 - Benefits
Administrators: www.wisconsin.edu/ohrwd/admin/benefits/rehired-annuitant/
 - Employees: www.wisconsin.edu/ohrwd/benefits/life-events/empcha/ra/

Wellness Incentive – Taxable Income

The \$150 Well Wisconsin Incentive is a fringe benefit; therefore, it is considered taxable income. The Department of Employee Trust Funds (ETF) sends reports to UW System twice a year notifying us of employees who have received the incentive.

Payrolls that employees will be taxed on are:

August Report –

- Biweekly: August 29th
- Monthly: August 30th

November Report –

- Biweekly: December 5th
- Monthly: November 29th

A report of employees to be taxed and an email template to assist with employee communications will be provided to institutions.

Wellness Incentive – Taxable Income

New:

ETF will manage reporting and issuing W-2s for local employer-paid annuitants, continuants and mid-year retirees who earned their incentive after being retired. The UW System will not be responsible for these individuals.

Questions:

Direct to StayWell at wellwisconsin@staywell.com or the health plan carriers (some offer incentive programs in addition to the \$150 Well Wisconsin Incentive). Reports will identify the incentive source, StayWell or the health plan carrier.

Questions?



GN: HRS Administration Website

- Transition to UW-Shared Services branding will occur the weekend of August 17-18
- <https://uwservice.wisconsin.edu/administration/>

Questions?



Institutional Feedback

- Eau Claire
- La Crosse
- Oshkosh
- Platteville
- Stevens Point
- Whitewater