

Institution Administrator Call

November 24, 2021

Agenda

- Portal Articles
- Update to Forms & Publication Webpage
- Calendar Year End Dates
- 2022 Benefit Plan Insurance Cards
- ACA Hours
- New State Tax Withholding
- 2022 Social Security Wage Base Increase
- Banked Leave Eligibility – University Staff
- ICI Deferred Enrollment
- Projected Sick Leave Balance Report
- Sick Leave Swap Process

Portal Articles

Recently posted articles:

November 16, 2021: [WRS News Online, November 2021](#)

November 15, 2021: [December 31 Deadline: Carryover Vacation/Personal Holiday](#)

November 8, 2021: [Deadlines for Health Care FSAs](#)

November 8, 2021: [Financial Wellness Webinars](#)

Upcoming articles:

- Social Security and Medicare Taxes for 2022
- 2022 UW 403(b) SRP Program and WDC Contribution Limits
- Update Your Address for Tax Form Distribution
- Reminder to University Staff: Review and Bank Leave Balances
- University Insurance Association (UIA) – December 6

Update to Forms & Publications Webpage

- UW-Shared Services is planning on consolidating benefit links on the Service Operations forms and publications in one central location.
 - uwservice.wisconsin.edu/forms/
- All benefit plan forms and publications are maintained on the UW System Employee Benefits website. All forms and publications on the Service Operations web page are available on the UW System Employee Benefits website.
 - Links to the corresponding benefit plan webpage will now be placed on the Forms Navigation section to direct users to the forms.
- UW-Shared Services will start to make this change over the next couple of weeks.

Update to Forms & Publications webpage

UW UNIVERSITY OF WISCONSIN SYSTEM

HOME UW SYSTEM HELP FORMS / PUBLICATIONS HRS ADMINISTRATION NEWS CONTACT DIRECTORY CALENDARS

Forms and Publications

FORMS NAVIGATION

- ACCIDENTAL DEATH AND DISMEMBERMENT

ACCIDENTAL DEATH AND DISMEMBERMENT

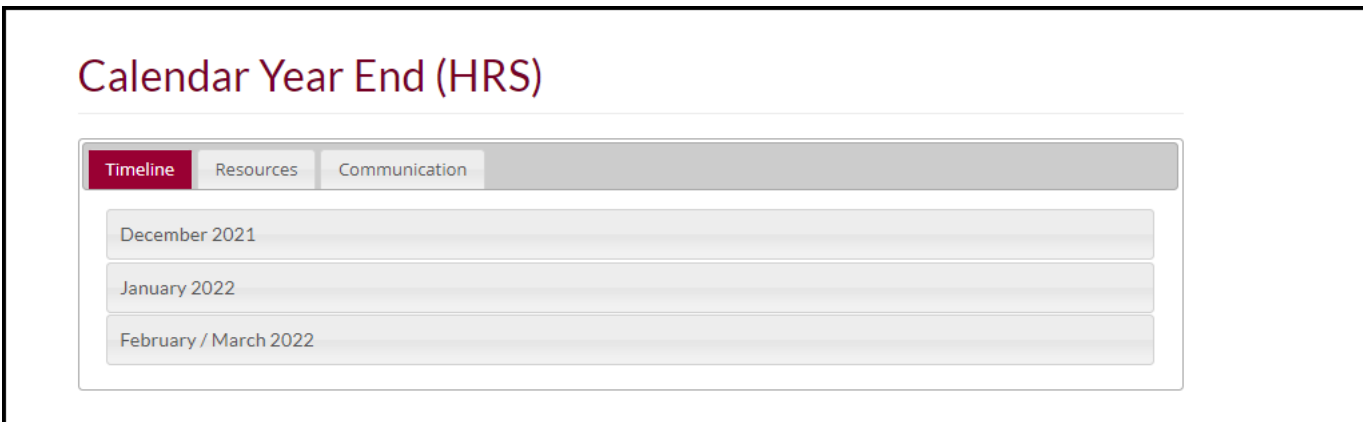
Forms

UWS 1245 [APPLICATION](#)

UWS 1247 [BENEFICIARY DESIGNATION](#)

Calendar Year End (CYE) Dates 2021

- Important Calendar Year-End Dates for 2021-22 have been released.
 - uwservice.wisconsin.edu/administration/cye
- Dates have been broken down by month for your convenience.



Calendar Year End (HRS)

Timeline Resources Communication

December 2021

January 2022

February / March 2022

2022 Benefit Plan Insurance Cards

- 2022 plan year insurance cards will be mailed out during the second week of December 2021
- Only employees with new enrollment and/or vendor changes will receive new cards
- If an employee has lost their card or needs a replacement card, contact the vendor directly
- Employees do have the option to view and print their insurance cards electronically by registering directly with the vendor online
- A portal article will be published the week of December 6, 2021

2022 Benefit Plan Insurance Cards

- State Group Health Registration
 - Employees can search their health plan's website for their membership portal
- Delta Dental Registration
 - www.deltadentalwi.com/s/registration
 - Call Delta Dental directly for Member ID at 800-236-3712
- Delta Vision Registration
 - member.eyemedvisioncare.com/stateofwi/en/register
- Optum Financial Registration
 - healthsafeid.optumfinancial.com/rt/register/secure_optumfinancial/en

ACA Hours

- ACAHW hours need to be provided for **all employees** who have a **lump sum** payment.
- Employees can enter ACAHW hours or institutions can request an upload.
- If hours are not entered timely, hours for lump sum payments will automatically be calculated at 8 hours per working day for the period the lump sum payment was entered for.
- Hours will most likely be overstated for the period adding more hours to the measurement period which could put the employee over the 130 average hours per month, making the employee eligible for health insurance under ACA rules but under State of WI benefit eligibility rules the employee would not be eligible.
- UW System cannot cover the employee but would be required to report the employee as eligible under ACA.
- Use **ACA report Missing ACAHW Hours** (UW_ACAHWREQ) to manage employees with lump sum payments with no ACAHW hours reported where Days-Worked Equivalency method is being used.
- See [Running the Affordable Care Act Reports in HRS \(KB 65060\)](#) for more information.
- Employees enter hours in their timesheet the same as any other hours worked. Code of ACAHW should be selected.
- Review the [Affordable Care Act \(ACA\) for Administrators web page](#) for additional ACA resources.

ACA Hours

- Requests for 2021 ACAHW entries should be submitted via a ticket by December 3, 2021 using the following format:
 - Dates must be a single day, not a date range
 - Hours should be in .25 increments and must not exceed 24 hours

| Name | Empl ID | Emp Rec | Date | # of Hours |
|------|---------|---------|------|------------|
|------|---------|---------|------|------------|

- 2021 ACA full year processing is planned for the week of December 20, 2021
 - All 2021 hours entered before December 20, 2021 will be included
 - ACAHW entries for lump sums paid in December should be entered by January 1, 2022

Questions?



New State Tax Withholding

- For tax year 2022, employees will have the option to set up taxable wage reporting and tax withholding for the following states:
 - **Massachusetts**
 - **North Carolina**
 - **Virginia**
- The UW System will now be registered in the following states:

| | |
|---------------|----------------|
| Wisconsin | Michigan |
| California | Minnesota |
| Iowa | North Carolina |
| Illinois | Virginia |
| Massachusetts | |

New State Tax Withholding

- UW-Shared Services will send out an email notification on Monday, December 13, 2021, to all active employees with an approved Remote Work Agreement or a home/ mailing address in *Massachusetts, North Carolina or Virginia*.

The defined population of employees and a copy of the email template will be available through the Service Delivery Teams. Your campus is then able to send this communication to anyone that may have been missed in this mailing, including applicable new hires.

- Employees that are interested need to submit a MA-W4, NC-W4, or VA-W4 to their campus for processing. Their first W-4 needs to be paper – all future updates can be accessed on Self-Service.
- www.mass.gov/doc/form-m-4-massachusetts-employees-withholding-exemption-certificate/download
- files.nc.gov/ncdoa/NC-4EZ-11-19.pdf
- www.regent.edu/admin/busoff/pdf/VA-4.pdf

New State Tax Withholding

- Elections for Massachusetts, North Carolina or Virginia withholding can be entered into HRS on or after Thursday, December 23, 2021, to be effective for 2022 payrolls.
- Administrators must date all entries with an effective date of January 01, 2022, or after.
- Instructions for entry in HRS can be found in KB 16889 - Entering an Employee's tax Form
 - kb.uwss.wisconsin.edu/page.php?id=16889

New State Tax Withholding

REMINDER!!!

- After you enter/update Tax Data W4, please update Tax Distribution.
- **Path: Payroll for North America/Employee Pay Data USA/Tax Information/Update Employee Tax Distribution**
 - Add a new row for MA, NC or VA 100% tax distribution.

(Every new employee is defaulted to WI 100%)

Update Tax Distribution

Employee [REDACTED] Empl ID [REDACTED] Empl Record 0

Tax Distribution Find | View All First 1 of 1 Last

*Effective Date 02/01/2020

Country USA

Insert Pre-filled Tax Location

States/Localities Personalize | Find | View All | First 1 of 1 Last

| *State | Locality | Locality Name | Percent of Distribution |
|--------|----------|---------------|-------------------------|
| MI | | | 100.000 |

New State Tax Withholding

Review Paycheck/Paycheck Taxes

- New state withholding can be viewed in the Tax Section of Review Paycheck
- Employees will see a new withholding line on their Earnings Statement

2022 Social Security Wage Base Increase

- The Social Security Administration announced that the 2022 social security wage base will be \$147,000
 - This is an increase of \$4,200 up from \$142,800 in 2021
- Reminder: There is no wage limit for Medicare tax; all covered wages are subject to the 1.45% tax
 - Wages in excess of \$200,000 will be subject to an additional 0.9% tax

Banked Leave Eligibility – University Staff

- The eligibility for University Staff to bank unused vacation is based on the following:
 - Years of Service, FTE & FLSA Status -or-
 - Vacation Accrual Rate & Sick Leave Accumulation

| University Staff Paid Leave Banking Schedule | | |
|--|---|--|
| Years of Service | Full-Time University Staff – Nonexempt | Full-Time University Staff – Exempt and Nonexempt Supervisors |
| First 5 Years | 0 hours | 0 hours |
| 5+ to 10 Years | 0 hours | 40 hours |
| 10+ to 15 Years | 40 hours | 40 hours |
| 15+ to 20 Years | 40 hours | 80 hours |
| 20+ to 25 Years | 80 hours | 120 hours |
| 25+ Years | 120 hours | 120 hours |
| Earn < 160 hrs of vacation & have accrued at least 520 hrs of sick leave | 40 hours | 40 hours |

Banked Leave Eligibility – University Staff

- Eligibility for employees is displayed in two places on their portal:
 - Absence balances within the timesheet
 - On the form under leave reports
- Entry for Banked Leave and cash payments must be dated and processed between 12/1 and 12/31
 - Self-service entry attempted prior to 12/1, even if using an effective date between 12/1 and 12/31, will generate an error upon submitting
- Entries dated and processed prior to the Dec A payroll confirmation will be paid on 12/16/21
- Entries dated and processed prior to the Dec B payroll confirmation will be paid on 12/30/21 (last check of the year)
 - It is **not** required that cash payments be included in the last paycheck of the calendar year.
- Entries dated and processed prior to the Jan A 2022 payroll confirmation will be paid on 1/13/2022

Banked Leave Eligibility – University Staff

- Forms received after 12/31/21 must be rejected
- Best Practice Considerations:
 - Use a non-scheduled workday (Saturday or Sunday) to avoid conflicts with Time & Labor
 - If possible, avoid entry between 12/19 and 12/31
 - This is the 13A/1A crossover for the new year
 - To target a cash payment in the 2022 tax year, this time period will have to be selected

Banked Leave Eligibility – University Staff

- Eligibility files along with the employee communication will be sent out in the near future.
- References:
 - [Entering and Reviewing University Staff Annual Leave Conversion Processing in HRS](#)
 - [Employee Tip sheet: Entering Banked Leave Conversion Through Self-Service](#)
 - [Running the Banked Leave Annual Eligibility/Election Summary Report in HRS](#)
 - [Annual Leave Conversion Instructions](#)
- Policy:
 - [UW System Administrative Policy 1210 \(formerly BN1\): Vacation, Paid Leave Banks, and Vacation Cash Payouts](#)
 - [Madison Policy Library: Vacation](#)

Questions?



ICI Deferred Enrollment

- An opportunity for University Staff employees to enroll in the ICI benefit plan for the first time if:
 - Sick leave balances are as of December B (pay period end 12/18/2021)

| ICI Category | Sick Leave Hours |
|-------------------------------|---------------------------------|
| University Staff - Category 3 | 80 Year to date balance* |
| University Staff - Category 4 | 520 – 727 Life to date balance |
| University Staff - Category 5 | 728 – 1040 Life to date balance |

*Prorated based on FTE or sick leave earned

ICI Deferred Enrollment

- An opportunity for Faculty, Academic Staff, Limited, University Staff employees to enroll in ICI each year if they have obtained 1040 hours or more of sick leave by end of December B
- Deferred enrollment opportunity for:

| ICI Category | Sick Leave Hours |
|--------------|------------------|
|--------------|------------------|

| | |
|-------------------------------|-----------------------------|
| University Staff - Category 6 | > 1040 Life to date balance |
|-------------------------------|-----------------------------|

| ICI Category | Sick Leave Hours |
|--------------|------------------|
|--------------|------------------|

| | |
|---------------------|-----------------------------|
| FA/AS/LI – 180 Days | > 1040 Life to date balance |
|---------------------|-----------------------------|

| ICI Category | Sick Leave Hours |
|--------------|------------------|
|--------------|------------------|

| | |
|---------------------|-----------------------------|
| FA/AS/LI – 180 Days | > 1040 Life to date balance |
|---------------------|-----------------------------|

| ICI Category | Sick Leave Hours |
|--------------|------------------|
|--------------|------------------|

| | |
|---------------------|-----------------------------|
| FA/AS/LI – 180 Days | > 1040 Life to date balance |
|---------------------|-----------------------------|

ICI Timeline

- **December 2, 2021** - Distribution of Projected Leave Balance Report
- **December 30, 2021** - Employee deadline to notify campus administrators to swap leave time
- **January 5, 2022** - Campus administrator deadline for entering leave time swap
- **January 15, 2022** – UW-Shared Services Service Operations will send email notices to employees eligible for Deferred and/or Supplemental enrollment into ICI
 - ICI look-up tool will be available
- **January 28 – 29, 2022** – UW-Shared Services Service Operations will be updating Job Data and ICI Benefit plan enrollment
- **March 1, 2022** – Employee deadline to submit paper application for Deferred or Supplemental enrollment into ICI
- **March 25 – 26, 2022** – UW-Shared Services Service Operations will be updating Job Data to provide election entry for Deferred or Supplemental enrollment into ICI
- **April 13, 2022** – Campus deadline for Biweekly payroll election entry for ICI Deferred Enrollment

ICI Resources

- Employee References:
 - www.wisconsin.edu/ohrwd/benefits/dis/ici/
- Administrator References:
 - [ICI Administrator Landing page](#)
 - A list of KB resources
 - Links to policies are available

Projected Sick Leave Balance Report

- Projected Sick Leave Balance report:
 - Displays a *snapshot in time* of current sick leave balances and *assumed* sick leave earnings that may be used for counseling the employee on swapping opportunities
 - December 2, 2021, the Projected Sick Leave Balance report will be available to campuses that wish to proactively counsel employees on sick leave swap

Projected Sick Leave Balance Report

- Assumptions made with the report:
 - Employee will *not* use any sick leave for the remainder of the year
 - All leave balances are up to date as of the November B payroll
 - Job Data accurately reflects FTE and leave of absences
 - Employee will earn sick leave based on FTE in Job Data
- The following have been removed from the report:
 - Employees age 70 and older
 - Employees enrolled in Category 6

Sick Leave Swap Process

- An employee may swap out used sick leave for unused leave (vacation, personal holiday, etc.)
 - Notification to employees of their eligibility to swap sick leave is a decision to be made by the institution
 - Sick Leave used to pay for health insurance premiums while on furlough *cannot* be swapped for other unused leave
- The opportunity to swap used sick leave for other leave can reduce ICI premiums or provide enrollment opportunities into the ICI program
- All leave swaps that will affect the ICI premium category must be:
 - Requested by the employee by the end of day Wednesday, December 30, 2021
 - Entered by administrators in HRS by 4:30pm on Wednesday, January 5, 2022
- The 2022 ICI premium category will not be affected by any leave swaps made after the ICI annual update process runs in January

Sick Leave Swap Process

Eligible Time Frame for Swapping:

- **University Staff:** January A 2021 to December B 2021
 - Eligible pay period dates: 12/20/2020 – 12/18/2021
 - When reviewing Results By Calendar, eligible leave swap is:
 - 13A2020: 12/20/2020 – 12/31/2020
 - 1A2021 - 12B2021: 1/1/2021 – 12/18/2021
 - Before performing a leave swap, check EACH calendar year's end balances to be sure the balance is available for swapping (13A of 2020 and 12B of 2021)
- **FA/AS/LI:**
 - Eligible pay period dates: 1/1/2021 – 12/18/2021

Questions?

