

Institution Administrator Call

December 9, 2021

Agenda

- Banked Leave Eligibility – 11/24 Call Follow-up
- Portal Articles
- Domestic Tax Renewal
- FY 2023 Organizational Dept Updates
- TTC Employee Choice (Voluntary Reassignment)
- Enrollment Deadline Worksheet
- New Employee Benefit Presentations

Banked Leave Eligibility – 11/24 Call Follow-up

- Nonexempt Supervisors who receive exempt leave accrual and banked leave eligibility are identified by their job code
- Effective with the TTC implementation on 11/7/21, the job codes end with an “X”

Portal Articles

Recently posted articles:

DECEMBER 1: [University Staff: Banking Leave Balances](#)

DECEMBER 2: [University Insurance Association \(UIA\) Life Insurance - Annual Premium Deduction](#)

NOVEMBER 29: [2022 Increase: Retirement Plan Contribution Limits](#)

NOVEMBER 22: [2022 Social Security and Medicare Tax](#)

Upcoming articles in December:

- Update Your Address for Tax Form Distribution
- 2022 Benefits ID Cards
- 2022 Benefit Premium Deductions
- 2022 Benefit Change Reminders

Domestic Tax Renewal

- Combination of automated and manual processes to renew tax exemptions that expire annually
 - Federal and/or State Withholding Exemption
 - W-200 (Employees pre-paying Wisconsin State Tax)
 - WT-4A (Employees electing to withhold flat amount of Wisconsin State Tax)
 - IRS Form 673 (U.S. Citizen performing UW work and residing outside USA)
- Federal Withholding Exemption Renewal Timeline
 - Expires after January C payroll
 - Employees notified week of 12/13/21
 - Employees to turn in forms by 1/28/22
 - Payroll entry deadline 2/16/22
 - Employees without new forms entered will be reset to Single / 0 Income Adjustments on 2/11/22

Domestic Tax Renewal

- State Withholding Exemption Renewal
 - State Exemptions expire 4/30/22
 - If an employee renews their federal and state before the state deadline, both will be renewed
 - A separate reminder will be sent for State renewal in April
- Other exemptions have different deadlines
 - W-200 Expires after December B biweekly
 - W-200 Entry 12/22/21-01/05/21
 - WT-4A Expires before the April A payroll
 - WT-4A Entry 4/01/22-4/13/22
 - IRS Form 673 Expiration Varies by Individual

Resource: uwservice.wisconsin.edu/docs/publications/pay-domestic-tax-renew-expiration.pdf

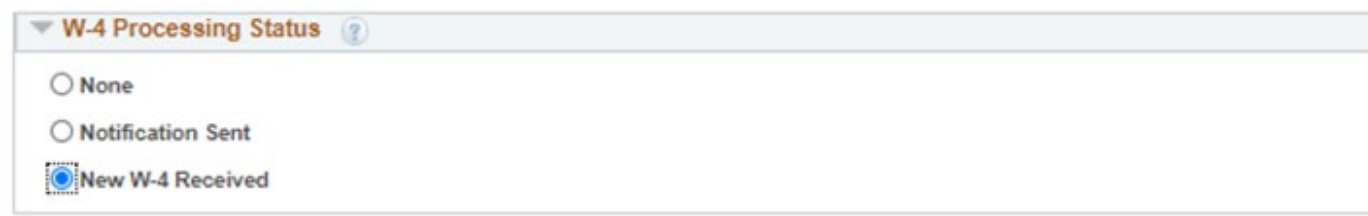
Domestic Tax Renewal

- Employees that use MyUW portal W-4 for exemption renewals will automatically have their radio buttons set correctly
- Employees must use the Form W-4 when renewing their exemption status
 - www.irs.gov/pub/irs-pdf/fw4.pdf
- Renewal emails will be sent automatically through HRS and a list will be provided with the impacted employees
- Bounce backs will be forwarded to the campuses for follow-up

Domestic Tax Renewal

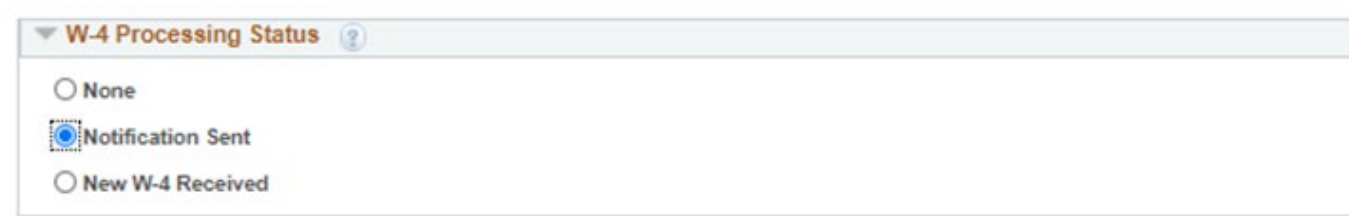
When notification process runs, W-4 processing status changes to “Notification Sent”

NOTE: This is in the “W-4 Processing Status” menu



A screenshot of a web interface showing a dropdown menu titled "W-4 Processing Status" with a help icon. The menu contains three radio button options: "None", "Notification Sent", and "New W-4 Received". The "New W-4 Received" option is selected, indicated by a blue dot and a dashed border around the radio button.

When new W-4 received, person entering must change status to “New W-4 Received”



A screenshot of a web interface showing a dropdown menu titled "W-4 Processing Status" with a help icon. The menu contains three radio button options: "None", "Notification Sent", and "New W-4 Received". The "Notification Sent" option is selected, indicated by a blue dot and a dashed border around the radio button.

If the status is not changed, employee will be changed to single/0 adjustments when W-4s reset

FY 2023 Organizational Dept Updates

- New Organizational Departments (ex: B010000) for Fiscal Year 2023 can be created now to assist with the budget process

- **Allows for automatic funding load from CAT**

Instructions and forms available on UW-Shared Services website, under HRS Administration, Human Resources, Organizational Department Changes:

- uwservice.wisconsin.edu/administration/human-resources/

Requests:

- Require signatures from authorized approver(s)
- Submit to serviceoperations@uwss.wisconsin.edu (non-Madison)
- Submit to hris@ohr.wisc.edu (Madison only)
- Email subject line: “FY23 Organizational Department Request”

FY 2023 Organizational Dept Updates

- Important Factors:
- Institutions will need to update Organizational Department for:
 - Positions
 - Jobs
 - POI data
 - Appointment-level funding on the Funding Data Entry page
- UW-Shared Services will provide a list of employees and POIs in the impacted departments


TTC Employee Choice (Voluntary Reassignment)

- Institution Human Resources
 - Communicates with eligible employees about the Employee Choice to move from *University Staff Exempt to Academic Staff/Limited Exempt* ([UW System Administrative Policy 1287 Voluntary Reassignment of FLSA Exempt Employees to Academic Staff/Limited Appointment Positions](#))
 - Provides employees Employee Choice — Voluntary Employee Class Reassignment Form & comparison document (due Dec 31, 2021 for Jan 2, 2022 effective date)
 - Adds names of employees to the [TTC Employee Choice Spreadsheet](#) in SharePoint
 - Updates position and job data in HRS with action reason,
 - POS 110 Voluntary Reassignment AS/LI
 - with effective date January 2, 2022, or first day of follow pay period after processing form
 - Notifies serviceoperations@uwss.wisconsin.edu of the change
 - If employee is enrolled in ICI, institution HR needs to collect an ICI application from employee to move them to the Academic Staff ICI program

University Staff employees who are moving from non-exempt to exempt have the option to move to either Academic Staff or Limited Appointment employee category depending on the designation of their TTC title. Project employees, retired annuitants, and University Staff-Temporary employees are not eligible to have their positions voluntarily reassigned to either an Academic Staff or Limited Appointment position. Review [UW System Administrative Policy 1287 Voluntary Reassignment to Academic Staff/Limited Appointment Positions](#) for details.

Below is a summary of payroll & leave reporting, paid leave, benefits, appointment terms, and other relevant changes to be aware of before choosing to switch employee categories. Contact benefits@uwss.wisconsin.edu for any questions prior to making this decision.

	University Staff - Exempt	Academic Staff / Limited Appointment - Exempt
PAYROLL		
Pay Periods	25 pay periods; paid biweekly	25 pay periods; paid biweekly
Overtime		Not Eligible
Direct Deposit		NO CHANGE
Taxes		NO CHANGE
Garnishments	NO CHANGE in withholding order or the timing of the deduction.	
PAID LEAVE		
Time Reporting	Exempt employees report/confirm hours worked on their timesheet.	Only absence entry is required. Payable hours are calculated by FTE.
Compensatory Time	Not Eligible	
Leave Reporting	Exempt employees report time off in 1/2-day or full-day increments in their timesheet or using	Exempt employees report time off in 1/2-day or full-day increments on the monthly leave report.


 UNIVERSITY OF WISCONSIN SYSTEM
 Employee Choice – Voluntary Employee Class Reassignment Form

The purpose of this form is to document that exempt University Staff have the relevant information to make an informed decision regarding whether to choose a voluntary reassignment of employee classification to Academic Staff or Limited Appointment position. Please send completed forms to benefits@uwss.wisconsin.edu.

Employees with permanent status in exempt University Staff positions have the choice to remain University Staff for as long as they hold those positions, or change their employee classification to either Academic Staff or Limited Appointments as designated by the job titles. Appointment terms for an Academic Staff or Limited Appointment will be determined by each university's policies.

Employee's will review the information in the **Employee Choice - Voluntary Employee Class Reassignment** comparison document including:

- Differences in paid leave accruals, including vacation and sick leave accrual;
- Differences in ability to bank and accumulate any paid leave;
- Differences in Wisconsin Retirement System (WRS) designations;
- Differences in employee paid benefit programs (for example, income continuation, life insurance); and
- Differences in appointment terms.

After an employee accepts a voluntary reassignment, there will not be an opportunity to return to exempt University Staff in the same position. Contact benefits@uwss.wisconsin.edu for any questions prior to making this decision.

Rev 11/23/2011

Employee to Complete

Employee Name: _____

I have read and understand the information detailed above and in the comparison document and voluntarily choose to move to Academic Staff.

I understand that I no longer have University Staff employee classification rights.

I understand that the effective date of this voluntary reassignment is January 2, 2022 or the first day of the following pay period after the move is processed by Human Resources and Service Operations.

I am not appealing my title.

Employee
signature/date: _____ / _____

Supervisor
signature/date* _____ / _____

*Signature acknowledges filing request; it does not signify agreement

Human Resources to Complete

Employee ID/Record: _____ Business Unit UW- _____

Department ID: _____

Job Code: _____ Job Title: _____

Employment Status (permanent, CP): _____

FTE: _____ Salary: \$ _____ hourly/\$ _____ annual

Change Completed in HRS: YES/NO _____ with effective date _____

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TTC Employee Choice (Voluntary Reassignment)

- UW-Shared Services, Service Operations
 - Payroll updates timesheet as needed
 - Benefit event is created & processed
 - Leave balances are transferred
 - Notifies institution HR employee has been processed and updated to Academic Staff/Limited
- Reference: [Voluntary Reassignment Process \(Univ Staff to Academic Staff/Limited\) in HRS \(KB 53474\)](#)

TTC Employee Choice (Voluntary Reassignment)

- Clarification on TTC process v. ongoing process
 - **TTC-related exemption changes** that resulted in the choice to move from University Staff to Academic Staff/Limited will be **effective January 2, 2022**
 - **Exemption changes due to job/position updates** that result in the choice to move from University Staff to Academic Staff/Limited will be **effective at the start date of the next payroll** following receipt and processing of the request from the institution to change empl class
 - Action Reason XFR 110 Voluntary Reassignment AS/LI may apply in these situations

Contact benefits@uwss.wisconsin.edu for any questions about benefits or the employee choice process

Enrollment Deadline Worksheet

- The Enrollment Deadline Worksheet (EDW) has been updated to an online form
- The new form will be available beginning December 13, 2021
- Use the EDW to inform new benefits eligible employees of their benefit enrollment period and coverage effective dates
- The EDW is not intended to determine eligibility for benefits or to provide benefit premium details
- Complete and provide each new benefits eligible employee with a copy to review, sign and return
- Retain a signed copy to verify employee's understanding of their benefit options and deadlines

Enrollment Deadline Worksheet

Enrollment Deadline Worksheet

Complete your elections in the [MyUW Portal](#) or submit applications during the From and To dates shown below for each benefit.

Reset Fields

EMPLOYEE DETAILS

Date:	10/15/2021	Employee ID:	<input type="text"/>	Institution:	<input type="text" value="Select Institution"/>
Employee Name:	<input type="text"/>	Annual Base Salary:	<input type="text"/>	Dept ID:	<input type="text"/>
Job Type:	<input type="text" value="[Select]"/>	Annual Salary (based on appt%):	\$0.00	MyUW Portal:	<input type="text" value="[Select]"/>
Job Title:	<input type="text"/>	Monthly Salary:	\$0.00	Transfer:	<input type="text" value="[Select]"/>
Appointment Type:	<input type="text" value="[Select]"/>				
Appointment %:	<input type="text" value=""/> %				

Shows for Faculty / Academic Staff / Limited Appointee, Student Assistant, Employee-in-Training.
Select 12 month or 9 month.

ELIGIBILITY DETAILS

Prior service under the Wisconsin Retirement System (WRS): State: months Local: months

First day of WRS covered employment at UW System:

30 days from first day of WRS covered employment at UW System:

- Directions will appear when you hover over the data entry fields (blue shaded box)
- Fields noted with a red bar indicate a required field
- To reset the form, click the red Reset Fields Button

Enrollment Deadline Worksheet

Complete your elections in the [MyUW Portal](#) or submit applications during the From and To dates shown below for each benefit.

EMPLOYEE DETAILS

Date:	10/15/2021			Institution:	UW-Madison
Employee Name:	Joe Employee	Employee ID:	12345678	Dept ID:	
Job Type:	Academic Staff Exempt	Annual Base Salary:	\$50,000.00	MyUW Portal:	Yes
Job Title:		Annual Salary (based on appt%):	\$50,000.00	Transfer:	No
Appointment Type:	12 month (A-Basis)	Monthly Salary:	\$4,166.67		
Appointment %:	100 %	Biweekly Salary:	\$1,923.08		

ELIGIBILITY DETAILS

Prior service under the Wisconsin Retirement System (WRS): State: 0 months Local: 0 months
First day of WRS covered employment at UW System: 11/11/2021
30 days from first day of WRS covered employment at UW System: 12/11/2021

HEALTH INSURANCE

Note: Once enrolled, you must remain enrolled for the entire calendar year unless you have a qualifying life event.

Benefit Plan Name	From:	To:	Coverage will be effective:
State Group Health Insurance			
	With Employer Contribution:		
	11/11/2021	12/11/2021	12/1/2021

Includes option to elect Uniform Dental Insurance
(Uniform Dental covers preventive services)

You are eligible for the full employer contribution towards your health insurance.

Note: If you do not want health insurance coverage through the State Group Health Insurance program, you may be eligible for the Opt-Out Incentive. This must be elected during your first 30 days of employment. See the benefits website for eligibility and more details.

DENTAL & VISION INSURANCE

Note: Once enrolled, you must remain enrolled for the entire calendar year unless you have a qualifying life event.

Note: Preventive Dental Insurance is only available if State Group Health Insurance is waived or the Opt-Out Incentive is elected.

	From:	To:	Coverage will be effective:
Preventive Dental Insurance	11/11/2021	12/11/2021	12/1/2021
Supplemental Dental Insurance	11/11/2021	12/11/2021	12/1/2021
Vision Insurance	11/11/2021	12/11/2021	12/1/2021

To create a PDF version, click on the “Create PDF” button at the bottom of the EDW

Create PDF

Sample PDF Document

Enrollment Deadline Worksheet

Enrollment Deadline Worksheet is located on the Benefits Administration web page (New Employees > Enrollment Deadline Worksheet):

www.wisconsin.edu/ohrwd/admin/benefits/newemp/

New Employee Benefit Presentations

- New Employee Benefit Presentations have been updated with 2022 benefit information
- 4 versions available
 - FA/AS/LI & University Staff (combined)
 - FA/AS/LI
 - University Staff
 - Graduate Assistant / Short-Term Academic Staff
- PowerPoint and PDF versions available
- Presentations located on the [Benefits Administration web page](#) (New Employees > New Employee Benefit Presentations):
www.wisconsin.edu/ohrwd/admin/benefits/newemp/

Questions?

