

# Institution Administrator Call

December 23, 2021

# Agenda

- Portal Articles
- Welcome New Human Resources Delivery Manager
- Update to Dependent Label
- Action Reason Update
- UW 403(b) Supplemental Program Changes
- Campus Collaboration & Discussion

# Portal Articles

## Recently posted articles:

- DECEMBER 17: [UW 403\(b\) Supplemental Retirement Program Webinars & Counseling Sessions](#)
- DECEMBER 13: [2022 Benefits ID Cards](#)
- DECEMBER 8: [2022 Benefit Deductions and Contributions](#)
- DECEMBER 7: [Check Your Address For Tax Form Distribution](#)
- DECEMBER 6: [Integrity Hotline for Faculty, Staff, Students](#)
- DECEMBER 2: [University Insurance Association \(UIA\) Life Insurance - Annual Premium Deduction](#)
- DECEMBER 1: [University Staff: Banking Leave Balances](#)

## Upcoming articles in December/January:

- 2022 Benefit Change Reminders
- Employee Well Being Webinars
- ICI Deferred Enrollment
- W-2 Forms Available Online
- ICI Premium Update

# Welcome Jenny Powell

- Jenny Powell has joined UW-Shared Services, Service Operations as the Human Resources Service Delivery Manager.
  - Twenty years of UW HR experience at UW-Milwaukee
  - Work with campuses on HR operational processing
  - Excited to have Jenny join our team
- Thank you, Tina Howell!
  - Tina will phase out of HR Service Delivery

# Update to Dependent Label

- The Relationship to Employee types for dependents will be updated in HRS to assist employees in choosing the correct type for their dependents.
- Starting on December 27, the dependent relationship labels will be:
  - Child will be changed to: Child (Under Age 26)
  - Step Child will be changed to: Step Child (Under Age 26)
  - Adult Child will be changed to: Adult Child (Age 26 and Over)
- A 12/1/2021 row will be added to all records that have these dependent relationships so they are visible to Administrators and Employees.

# Action Reason Updates

- With the TTC project, there is clarification on when to use specific Pay Rate Change reasons.

Action	Action Reason	Effective Date	Status	Description	When to Use
CPR	006	11/7/2021	A	Equity	Used for a salary increase to ensure employees are being paid fairly without regard for a protected class (race, color, gender, religion, sex, national origin, age, and/or disability) for employees in the same or similar job titles.
PAY	006	11/7/2021	A	Equity	Used for a salary increase to ensure employees are being paid fairly without regard for a protected class (race, color, gender, religion, sex, national origin, age, and/or disability) for employees in the same or similar job titles.
CPR	007	11/7/2021	A	Progression Within Range	Used for a salary increase within an employee's salary range due to performance, increased knowledge, skills, abilities, years of experience, certifications/licenses/degrees, and/or other elements that add value to an employee's ability to perform his/her job and ability to impact his/her department, division, and/or institution
PAY	007	11/7/2021	A	Progression Within Range	Used for a salary increase within an employee's salary range due to performance, increased knowledge, skills, abilities, years of experience, certifications/licenses/degrees, and/or other elements that add value to an employee's ability to perform his/her job and ability to impact his/her department, division, and/or institution

# Action Reason Updates

Action	Action Reason	Effective Date	Status	Description	When to Use
POS	013	11/7/2021	A	Job Code Chg-Lateral	Used for the transfer of an employee into a job that is assigned to the same salary grade as the employee's current job.
CPR	022	11/7/2021	I	Market Factor - Outside Offer	
PAY	022	11/7/2021	I	Market Factor - Outside Offer	
CPR	041	11/7/2021	A	Parity	Used for a salary increase to ensure appropriate salary relationships are maintained for employees within the same job title or related job titles
PAY	041	11/7/2021	A	Parity	Used for a salary increase to ensure appropriate salary relationships are maintained for employees within the same job title or related job titles
CPR	081	11/7/2021	A	Market Factor - Retention	Used for a salary increase to support effective recruitment and retention of employees in job titles affected by unusual labor market conditions. A Market Factor Adjustment may be implemented for any job class when either or both of the following conditions exist: (1) There is clear documentation of substantial, compensation-related difficulties in recruiting applicants for the particular job class in a defined labor market area; (2) Retention of current employees is jeopardized by the limits of the compensation plan when compared to appropriate labor market rates.
PAY	081	11/7/2021	A	Market Factor - Retention	Used for a salary increase to support effective recruitment and retention of employees in job titles affected by unusual labor market conditions. A Market Factor Adjustment may be implemented for any job class when either or both of the following conditions exist: (1) There is clear documentation of substantial, compensation-related difficulties in recruiting applicants for the particular job class in a defined labor market area; (2) Retention of current employees is jeopardized by the limits of the compensation plan when compared to appropriate labor market rates.

# 403(b) Supplemental Retirement Program Changes

- Beginning in 2022, there will no longer be a minimum 403(b) contribution requirement.
  - The old minimum was \$8 per biweekly payroll.
  - Minimum eliminated to make administration easier.
  - Participants can increase or decrease their contributions in the MyUW portal, in the Benefits Information tile.
- Revenue was returned to T. Rowe Price, Fidelity, and TIAA participants in late November and early December. Participants can see this online or also on the quarterly statements from the respective providers.
- Upcoming portal articles about the revenue return and the elimination of minimum contributions.



# 403(b) SRP Changes Timeline & Info

- Files were sent to TIAA and Fidelity on December 20<sup>th</sup> with information on participants with contributions in 2022. TIAA and Fidelity will create new accounts by December 23<sup>rd</sup>.
  - Participants must create a logon and password to get access to their online accounts.
- TIAA does not have a deadline for entering fund selection – as long as the fund selection is there BEFORE the money arrives (either from T. Rowe Price OR from the UW System from the January 13 payroll) the transfer or contribution will be invested according to the designation on file.
- Balance transfers:
  - T. Rowe Price balances will be transferred to Fidelity during the first week of January; T. Rowe Price will then audit and reconcile.
  - Remaining T. Rowe Price balances will be sent to TIAA the end of the second week of January.
- Once funds are in participants' accounts, participants can move the funds as they wish – from one investment to another, into or out of the Brokerage window, etc.
- Participants can transfer balances within the plan at any time; requires paperwork.
  - From frozen providers (for example, Ameriprise, Lincoln) to current providers - TIAA or Fidelity.
  - From Fidelity to TIAA or TIAA to Fidelity.

# Questions?



# Campus Collaboration & Discussion

- Request from the Green Bay Campus:
- We would like to know what other campuses are doing for Supervisor Training?
  - Are you holding the training sessions during the pandemic?
  - Are they virtual, in person, hybrid?
  - Did you have a program in place prior to the pandemic that you scaled back due to the pandemic?
  - If you scaled back, what topics are you covering during this training and what topics have been set aside?
  - Do you incorporate outside sources (such as LinkedIn Learning) into your training?