

Institution Administrator Call

January 20, 2022

Agenda

- Portal Articles
- 403b Supplemental Retirement Program Changes Timeline
- FY22 Automated Pay Plan Letters
- Immunization Record Updates
- ICI Process
- ICI Timeline and Resources

Portal Articles

Recently posted articles:

JANUARY 15: [ICI Deferred Enrollment through March 1, 2022](#)

DECEMBER 27: [Reminder: 2022 Benefit Changes](#)

DECEMBER 13: [2022 Benefits ID Cards](#)

DECEMBER 8: [2022 Benefit Deductions and Contributions](#)

Upcoming articles:

- W-2 Forms Available Online
- ICI Premium Update

UW 403(b) Supplemental Retirement Program Changes Timeline

- T. Rowe Price balances were transferred to Fidelity during the first week of January; all went smoothly. Participants will be able to **view their accounts** on the Fidelity website the week of January 16th.
- Remaining T. Rowe Price balances were sent to TIAA January 13th. Participants will be able to **view their accounts** on the TIAA website the week of January 23rd.
- Once money is in participants' accounts, participants can move the money 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

UW 403(b) Supplemental Retirement Program Info

- We have received questions regarding pre-tax and Roth (after-tax) contributions
 - The contributions are identified as pre-tax or Roth on the UW System remittances files and the providers track the contributions and earnings separately
- 403(b) participants can increase or decrease their contributions in the MyUW portal at any time, click on the Benefits Information tile – or use the SRA eForm
 - Use the SRA to start or stop contributions
- There will be upcoming portal articles about the revenue return, the elimination of minimum contributions, and the timeline

FY22 Automated Pay Plan Letters

- Pay plan increase updates have been made in HRS with an effective date of 01/02/2022
- Institutions elected to participate in the automated pay plan letters: UWPKS; UWPLT; UWRVF; UWSTP; UWSUP; UWSYS; UWWTW
 - All other institutions will produce employee letters
- Pay Plan letters will be sent to employees with a personalized letter attached (in PDF format) **today, 01/20/2022** (after hours)
 - A copy of the letter will be added to employee's Pfile

Immunization Record Form Update

- Immunization Record form language has been updated to clarify that employees may provide the latest date when they received either the final vaccine dose or their most recent booster shot
 - Now states “Please provide the date when you received either the final vaccine dose or your most recent booster shot.”
- A new form should be submitted to add new immunization date
- Navigation: ESS > Personal Details > Immunization Record Form

Immunization Record Query Update

- UW_HR_IMMUNIZ_VACCINE query has been updated to provide a list of employees who have both the COVID vaccination & booster shot, showing all recorded dates in the results
- This report can be used by institutions to track employees who are still not vaccinated and may have to follow University testing guidelines

ICI Process: Deferred Enrollment

- Leave swap process is the start of the annual Income Continuation Insurance (ICI) processing which was completed on January 5, 2022
- Annual enrollment opportunity into the following categories for Faculty, Academic Staff, Limited Appointees (FA/AS/LI) and University Staff employees if they have obtained 1,040 hours or more of sick leave* after December 12B payroll
 - FA/AS/LI – 180-day elimination period
 - University Staff – Category 6
- Additionally, University Staff employees have an enrollment opportunity if it is the first time their sick leave balance* as of the 12B payroll qualifies them for a premium category that provides an employer contribution:

ICI Category	Sick Leave Hours
Category 3	Accumulate at least 80 hours of sick leave during the year (prorated if based on FTE)
Category 4	520 – 727 hours of sick leave accumulated
Category 5	728 – 1,040 hours of sick leave accumulated

*See Furlough and ICI slides

ICI Process: Deferred Enrollment

- Supplemental ICI Enrollment Opportunity – Annual enrollment opportunity to enroll in the supplemental ICI for employees who are enrolled in Standard ICI and have eligible earnings that exceed \$64,000
- Communications:
 - Email to eligible employees: Sent January 15, 2022
 - Deadline to enroll: Applications must be received by institutions no later than Tuesday, March 1, 2022

ICI Process: Premium Update

Factors affecting premium amounts:

- Annual Premium Update*
 - FA/AS/LI – 2021 eligible earnings and elimination period elected
 - University Staff – 2021 eligible earnings and unused sick leave balance as of December 18, 2021
- Premium Rate
 - For 2022 the ICI premium rates will decrease

Effective Date of Premium Changes: February 1, 2022

- Starting with the February 24, 2022 paycheck

Communications:

- Email to eligible employees: Sent January 25, 2022
- Portal articles: Week of January 18th and January 24th

*See Furlough and ICI slides

ICI Process: Furloughs and ICI

*How will a furlough and/or an unpaid leave of absence affect an employee's ICI enrollment opportunity, premium and/or benefit?

- Employees placed on an *intermittent furlough and/or a temporary work reduction* during 2021:
 - If sick leave hours were used to pay for health insurance premiums an employee may not reach the required number of hours to have a deferred enrollment opportunity
 - Employees may experience a change to their ICI premium because of reduced earnings and a change in sick leave balance (for University Staff only and if sick leave hours were used to pay for health insurance premiums)
 - If the employee becomes disabled in 2022, their ICI benefit will be based on their 2021 eligible earnings

ICI Process: Furloughs and ICI, cont'd

- Employees placed on a *consecutive day furlough during 2021 (considered an unpaid leave of absence)*:
 - Eligible earnings and sick leave balances (for University Staff only and if sick leave hours were used to pay for health insurance premiums) will be based on the amounts in effect prior to the consecutive day furlough (unpaid leave of absence) and will continue to be used until the employee has a full calendar year of eligible earnings. Employee's ICI premium should not change as a result of earnings or sick leave balance change.
 - Note: premiums may change due to the rate decrease
 - If the employee becomes disabled in 2022, the ICI benefit will be based on that same eligible earnings

ICI Timeline

January 15, 2022

- UW-Shared Services sent email notices to employees eligible for Deferred and/or Supplemental enrollment into ICI
- Administrators use the HRS Email Lookup Tool to find employees who have received the deferred and/or supplemental enrollment email
 - Main Menu > UW Enterprise Utilities > Mail Retrieval Page
- ICI look-up tool will be available on the ICI Landing page
 - It provides ICI category and premium information by Empl ID
- Applications received for deferred enrollment cannot be entered into HRS until April 3, 2022, after the Deferred ICI process runs

ICI Timeline

January 22, 2022

- UW-Shared Services will send email notices to employees whose ICI premium will change effective 2/1/2022
 - If there are questions regarding premium calculations for an employee, submit a ticket to serviceoperations@uwss.wisconsin.edu
- Administrators use the HRS Email Lookup Tool to find employees who have received the ICI premium update email
 - Main Menu > UW Enterprise Utilities > Mail Retrieval Page

January 28, 2022 – January 29, 2022

- UW-Shared Services will be updating job data and ICI benefit plan enrollments
- No HR job data entry and benefit processing from 7:00 pm on Friday, January 28, 2022 to midnight Saturday, January 29, 2022

ICI Resources

Employees:

- UW System HR Employee Benefits [ICI web page](#)
- [Premium rates](#)

Administrators:

- [ICI Administrator Landing page](#)
 - Timeline
 - Look-up tool
 - KBs

Policies:

- [UW System Administrative Policy 1212 \(formerly BN 3\) Sick Leave](#)
- [UW-Madison Sick Leave Policy](#)
- [UW System Administrative Policy 1200-Interim: Furlough](#)
- [UW-Madison Furlough Policy](#)

Questions?

