

Institution Administrator Call

February 2, 2023

Agenda

- Portal Articles
- HRS Extended Outage February 18 & 19
- Upcoming Training
- America Saves Week
- CYE 2022 Date Reminders
- Employees Missing SSN Numbers
- Person Assignment Checklist Update
- Employee Termination Date – Reminder

Portal Articles

Recently posted:

- W-2 Forms Now Available Online
- WRS News Online, January 2023
- Saving 1% More for Retirement

Upcoming articles:

- Employee Well-being Webinars
- 1095-C Forms Now Available Online
- Income Continuation Insurance: Deferred Enrollment and Premium Update

HRS Extended Outage February 18 & 19

HRS outage beginning at 8:00 AM on Saturday, February 18 through 10:00 AM on Sunday, February 19

- A banner message will be posted on MyUW portal
- A message will be posted to the announcement tile in HRS

Impacted areas include

- HRS production access
- MyUW (time, absence, personal information, benefits, including access to tax documents)
- TAM application service
- EPM Data Warehouse

Upcoming Training

- HR
 - Intro to Hire (Remote online)
 - Wednesday Feb 15, 12:30 – 3:30pm
 - Updates: Person, Position, Job (Remote online)
 - Wednesday Feb 23, 12:30 – 3:30pm
 - Rehires, Transfers & Multiple Jobs (Remote online)
 - Wednesday March 1, 12:30 – 3:30pm
- Funding
 - Setting Up Funding (Remote online)
 - Tuesday Feb 21, 9:00 – 12:00pm
 - Changing Funding (Remote online)
 - Tuesday Feb 28, 9:00 – 12:00pm
- TAM
 - Recruiting in TAM (Remote online)
 - Friday Feb 2, 8:30am – 4:00pm

Upcoming Training

- Courses are assigned based on HRS security roles
- Assigned courses appear on individual's [HRS Learning Path](#)
- A list of employees with the appropriate security role but have not yet taken the course will be sent to each campus CHRO

America Saves Week



UW System is promoting financial well-being with the America Saves Week campaign *February 27 – March 3, 2023* with webinars, credit checks, and other resources.

America Saves Week encourages individuals and families to save money, reduce debt, and build wealth.

Theme: A Financially Confident You

www.wisconsin.edu/ohrwd/americasaves/

America Saves Week

February 27 – March 3, 2023



During this week, UW System will feature live and on demand webinars, presented by:

- Employee Assistant Program (EAP) provider, **Kepro/My Secure Advantage, Inc.**
- Summit Credit Union
- UW Credit Union
- Wisconsin's 529 Plan provider, **Edvest**
- UW 403(b) Supplemental Retirement Program (SRP) providers, **Fidelity and TIAA**
- Wisconsin Deferred Compensation (WDC) Program provider, **Empower**

Help us get the word out about this event on your campus! Look for the following:

- portal articles to link to in your campus newsletters and link to on your campus website
- social media posts to reshare
- flyer to post in employee areas around campus

UW System (from uwshr@uwsa.edu) will send communications materials to campuses as America Saves Week gets closer.

America Saves Week

February 27 – March 3, 2023



Help employees earn their \$150 Well Wisconsin incentive by using an America Saves Week event as an employer sponsored wellness activity. Review the [Employer-Sponsored Activities Implementation Guide](#) for details.

- Examples:
 - Group viewing of a webinar – Pick a webinar to promote, reserve a conference room to view the webinar as a group, facilitate a discussion of the topic. Be sure to take attendance.
 - Individual viewing of a webinar – Promote an event or a selection of events and ask employees to report to you their attendance

CYE 2022 Date Reminders

- Everything so far completed on or ahead of schedule. February/March still on target.
- Full Schedule available at: uwservice.wisconsin.edu/administration/cye

The screenshot shows a web interface with two tabs: 'Timeline' (selected) and 'Resources'. Below the tabs are three horizontal bars representing months: 'December 2022', 'January 2023', and 'February / March 2023'. The 'February / March 2023' bar is highlighted in maroon. Below this bar is a list of dates and events:

FEBRUARY 6	First CYE post to WISDM (approximately)
FEBRUARY 15	Targeted print date for 2022 Fellowship/Scholarship Letters
MARCH 8	Targeted print date for 2022 1042-S forms
MARCH 10	Targeted date for employees to receive 2022 1042-S forms
MARCH 15	IRS deadline for 1042-S distribution to employees
MARCH 17	Second CYE post to WISDM (approximately)

CYE 2022 Date Reminders

- W2 Highlights:
 - W2 mailing completed on January 25 – a total of 89,724
 - Duplicates can be requested February 6
 - W2-C's will begin February 15

- 1095-C Highlights:
 - 1095-C electronic copies are now available in the MyUW portal
 - Paper copies were mailed Monday, January 30, to employees who did not consent to the electronic form
 - A total of 22,912 forms were mailed
 - Employees will expect to receive their mailed copy by February 15

Employees Missing Social Security Numbers

Add a Person in HRS

- Employees missing or without an SSN automatically defaults to XXX-XX-XXXX with a National ID type of “Social Security Number” when you save
- Add a new row and enter National ID type of “UW Reporting ID” and a National ID number that is equal to 0 + EMPL ID
- Check the Primary ID box associated with UW Reporting ID

References

- KB-15739: Adding a Person <https://kb.uwss.wisconsin.edu/15739>
- KB-17358: Add a Person Job Aid <https://kb.uwss.wisconsin.edu/17358>

Employees Missing Social Security Numbers

Importance of Entering Valid National ID Information

- Benefit eligible employees: insurance vendors require a valid number when reporting for benefits (SSN, ITIN or UW Reporting ID)
- Required to report W2 earnings with a valid SSN or Reporting ID

UW_HR_MISSING_SSN WED

- Gives campuses the ability to catch these issues if a National ID was not entered at the time the person was added in HRS
- KB-33384: Processing the Missing or Incorrect Primary National ID/SSN WED Report in HRS <https://kb.uwss.wisconsin.edu/33384>

Person Assignment Checklist Update

- Label Update in HRS on Tuesday, February 7, 2023

Code	Current Description	New Description
UWPOTY	Position of Trust = Yes	Position of Trust = Yes NoRchk
UWPOT2	Position of Trust = MSN 2 Year	Position of Trust = Yes 2 Yr Rq
UWPOT4	Position of Trust = Vulnerable	Position of Trust = Yes 4 Yr Rq

Employee Termination Dates

Background:

- Issues arising with employees requesting a resignation with an effective date weeks or months after their last work day
- C-basis employees with no summer assignment or fall contract offer seeking to resign after the end of the spring semester

References:

- [Wisconsin Retirement System \(WRS\) Administration Manual \(ET-1127\), Section 1403](#)
- Wis. Admin Code ETF 10.08 (3)

Employee Termination Dates

The date reported to the Department of Employee Trust Funds (ETF) should be the earliest of:

1. The date the employer determines that the employment relationship terminates

Note: The effective date of the termination cannot be earlier than the date the employer notifies the employee of the termination

2. The date on which the employer discharges the employee

3. The last date for which the employee receives earnings for personal services rendered to, or on behalf of, the employer, unless the employer has granted an unpaid leave of absence for a period after this date

Note: Teachers employed under a 9-10-month contract may be considered terminated as of the last day they are required to perform district related work rather than the last day of the contract's fiscal year

4. The date the employee's voluntary resignation is effective as accepted by the employer or, if later, the date the employer receives the employee's notice of resignation. **Retroactive resignation is not permissible**

5. The date an unpaid leave of absence expires when an employee fails to return to work following the leave

6. The date three years after an unpaid leave of absence began, except for military leave or union service leave

7. The date of the employee's death

Employee Termination Dates

- **Example 1:** The school district hires Charley to work the 2018-2019 school year. She completes all assignments and her last day of work is June 10, 2019. Charley signs a contract to teach the following 2019-2020 school year. On August 3, she resigns from employment. The employer will process an August 3, 2019 termination and last day paid of June 10, 2019.
- **Example 2:** The employer and employee relationship ended between the School District of Everywhere and Michael on June 14, 2019. Michael wants to retire. The school district processed a termination transaction with a term date of June 14, 2019. Michael is 54 at the time of termination and does not turn 55 years old until July 1, 2019. Michael asks the employer to change the term date to July 1, 2019. However, the correct termination date that the employer must process is June 14, 2019.

Employee Termination Dates

- **Scenario 1:** C-Basis employee decides the spring 2023 semester will be when they stop working. The employee does not have a summer contract. The employee informs their department and HR on August 12, 2022 they want their terminate date to be August 2, 2023. Is this allowed?
 - A: Yes, the employee's termination date can be August 2, 2023. The employee can choose when their last day is.
 - B: No, their termination date needs to be May 19, 2023 at the end of the spring semester since it is the last day they will render service for the UW System
 - C: No, their termination date needs to be August 12, 2022 when they informed their department and HR

Employee Termination Dates

- **Scenario 2:** C-Basis employee plans to work in the fall of 2024. They do not have a summer contract. The last day of the spring semester was May 19, 2023. The employee changes their mind and informs their department and HR on July 14, 2023 they will not be returning in the fall. What should the employee's termination be?
 - A: The date the employee gave notice, July 14, 2023
 - B: The date the spring semester ended, May 19, 2023
 - C: The first of the month following their notice, August 1, 2023

Employee Termination Dates

- **Scenario 3:** C-Basis employee decides after the summer 2023 semester that ends on August 18, 2023 they will stop working. The employee does have a summer contract. The employee informs their department and HR on August 12, 2022 they want their terminate date to be September 2, 2023. What is allowed?
 - A: Termination date can be September 2, 2023. The employee worked a summer contract and can decide when their termination date is.
 - B: The employee can't work during the summer since they are not returning in the fall. Their termination date needs to be in May 2023 when the spring semester ended.
 - C: Termination date would need to be August 18, 2023 the last day the employee rendered service

Employee Termination Dates

- Reminders:
 - To preserve sick leave employee must start their WRS annuity or lump-sum retirement payment within 30 days of their termination from state employment. Employee can also escrow sick leave if eligible. Exceptions for employee with 20 years of service and disability. Review [Sick Leave Credit Conversion Program Brochure \(ET-4132\)](#), page 6 for more information.
 - Rehired Annuitants – Must have a valid termination and may not return to WRS-eligible employment before the 76th day after termination of WRS-covered employment
 - Resources:
 - [UW System Administrative Policy 1229 \(formerly GEN 10\) Rehired Annuitants](#)
 - [Information for Rehired Annuitants \(ET-4105\)](#), page 3-4

Employee Termination Dates

- **Scenario 1 Answer: B**
- **Scenario 2 Answer: A**
- **Scenario 3 Answer: C**

Questions?



Ticket Reminder

When sending an email to service operations remember to include the following critical information:

- Full legal name (First & Last Name)
- Employee Empl ID
- Employee Record

If seeing unexpected results or error messages, include a screenshot.

Campus Collaboration & Discussion

- For discussion topics email uwss-svc.CampusCallSlides@uwss.wisconsin.edu