

# Institution Administrator Call

May 11, 2023

# Agenda

- Portal Articles
- Upcoming Training
- 2023 Short Work Break Process
- Outside Activity Report Updates
- ATP Data Clean Up- Reports To
- Reminder – Funding Page Lockout
- Benefit Audit
- Summer Prepay

# Portal Articles

## Recently posted:

- [Review/Update Your Personal Information](#)
- [WRS News Online, May 2023](#)
- [Employee Well-being Webinars](#)

## Upcoming articles:

- UW 403(b) Supplemental Retirement Program (SRP)
- Submit Leave Reports by June 30, 2023

# Upcoming Training

- HR
  - Updates: Person, Position, Job (Remote online)
    - Wednesday May 17, 12:30pm-3:30pm
  - Rehires, Transfer & Multiple Jobs (Remote online)
    - Thursday June 1, 12:30pm-3:30pm
- FN
  - Setting Up Funding (Remote online)
    - Thursday June 15, 9:00am-12:00pm
  - Changing Funding (Remote online)
    - Friday June 16, 9:00am-12:00pm
  - Direct Retro (Remote online)
    - Friday June 23, 8:30am-11:30am

[My Learning Path \(wisconsin.edu\)](https://wisconsin.edu)

# 2023 Short Work Break Process

- All Active C-basis employees will be put on Short Work Break through a mass update process that will run on May 20, 2023 (effective date is one day after the institution's end of academic year)
- After the mass update process, any jobs that need to be put on a Short Work Break will need to be done manually in Job Data with an action of Short Work Break and applicable reason code

# Outside Activity Report Updates

- Initial Outside Activity Reporting process is complete
- Cleanup process is underway
  - Terminated employee OAR forms have been cancelled
  - Reports To changes are updated daily to reroute approval notice
  - On May 10, 2023, 357 emails were sent out to employees with outstanding OARs
  - Week of May 15 email to be sent to supervisors with outstanding approvals
  - Week of May 22 OAR status report will be provided to each institution and ongoing as needed

# ATP Data Clean Up

To help keep Supervisory Organizations up to date in preparation for Workday, there will be changes to the *Reports To* Workflow Exception Dashboards (WEDs) starting next Tuesday (5/16)

The following WEDs will be updated to include all empl classes except for Student Help (SH)

- UW\_HR\_POSITION\_MISSING\_REPORTS\_TO - Filled positions where Reports To is blank
- UW\_HR\_POSITION\_REPORTS\_TO\_VACANT - Filled positions where Reports\_To contains a Position Number that has no active incumbents
- UW\_HR\_POSITION\_REPORTS\_TO\_CONFLICT - Filled positions where Reports\_To does not match the incumbent's Reports To value on the job record

# Questions?





# Reminder : Funding Page Lock Out

- Budget Funding Data Entry and Direct Retro page lockout begins at 4PM on Friday June 2, 2023, for:
  - FY2024 Funding load from Compensation Administration Tool (CAT)
  - Test Rollover of FY2023 funding to FY2024
- Funding Data Entry and Direct Retro pages will be available by the end of the day Monday June 5, 2023
- The same pages will be unavailable again from June 16 to June 20, 2023.

# Benefit Audit

- Audits
  - Benefits – ETF is auditing their data and reaching out to UW-Shared Services for assistance
  - Employees may be contacted by a Benefits Counselor to provide dependent SSN and/or DOB
  - Employee will be asked to call the Benefits Counselor with the information or to provide times to schedule a brief virtual meeting to provide the information. If the employee isn't comfortable providing this information in these formats, they will be directed to campus HR staff to provide the information to relay the information to the Benefits Counselor.
- Emails and Tickets
  - Remind employees not to include PII in emails or tickets
  - Personally Identifiable Information includes but is not limited to:
    - Social Security Number (SSN)
    - Date of Birth (DOB)
    - Banking Account Routing Number
    - Banking Account Number
    - Driver's License Number
    - Passport Number

# Questions?



# Summer Prepay

Additional information on Expected Job End Date (EJED) processing and Summer Prepay process were provided in the February 16, 2023 call. These slides are reminders as institutions work through the EJED process.

- In order to maintain benefits the employee's C-Basis (Academic Year) Empl Record:
  - Must have active HR Status throughout the payroll being processed
  - Must be on a Short Work Break during the summer
  - Must be the benefit primary job
  - Insurances must be active for prepays to disburse
- Job Terminations
  - All insurances terminate at the end of that month
  - Any remaining prepay balance will be refunded upon reconciliation

# Summer Prepay

The correct action reason/code needs to be used in job data to distinguish employees on short work break versus a personal leave of absence.

- Short Work Break (FA/AS/LI):
  - C-basis employees are required to continue insurances. Benefits may be cancelled due to non-payment and employees will not have an opportunity to re-enroll in insurances until a qualifying event or annual benefit enrollment, whichever is sooner.
- Personal LOA (University Staff):
  - Employees are given the opportunity to lapse insurances and when employees return to work, they are eligible to re-enroll due to Add Coverage – Return from LOA

# Summer Prepay

## Expected Job End Date (EJED):

- Run the EJED query daily to make necessary corrections/revisions to prevent negative impacts to an employee's summer prepays and normal benefits deductions
- Employees that don't have their EJED managed properly will be terminated and will need to be rehired and insurances will need to be reinstated
- If the EJED process runs the employee will be terminated and the following actions will occur:
  - Employee's insurance(s) will be terminated
  - Employee will receive COBRA notification
  - Vendors will be notified of insurance termination
  - Benefits deductions will not take
  - Summer prepays will not be deducted
  - Denial of services
  - Arrears, Benefits Billing, etc.
  - Incorrect Employee Subsidies via Marketplace

## Reminder:

- Remember to review which Empl Record the benefit primary flag is on. The flag may have been reassigned if the benefit primary job was terminated.

# Summer Prepay

- Reminders:
  - Responsibility for employer costs when an employee transfers between institutions:
    - The employing institution of the employee for the spring semester is responsible for paying the fringe benefits for the summer coverage
    - The spring appointment should continue and be placed on a short work break. The spring appointment termination date must align with the end of the summer appointment.
  - The UW is considered one employer:
    - Department Transfers
    - Institution Transfers
  - Leave of Absence WED:
    - Institutions have until Friday, June 16, 2023, to review the LOA report and enroll employees in Benefits Billing
      - Benefits Service Delivery reviews for all institutions except UW-Madison
    - UW-Shared Services will take action on Monday, June 19, 2023

# Summer Prepay

- Reminders:
  - New Hire with *both* a Summer Appointment and a Fall Appointment
    - The same effective date must be used for *both* the summer appointment and the fall appointment
    - If the fall appointment is not entered at the same time as the summer appointment, the employee is not eligible for benefits
    - Summer appointments are not eligible for benefits as a stand alone appointment
  - Scenario:

An employee is hired for a summer service/summer session appointment with an effective date of June 21, 2023. The employee's fall appointment (WRS eligible appointment) should have a start date of June 21, 2023 and be placed on a short work break.



# Summer Prepay

- What if the employee does not have enough earnings to cover summer insurance deductions?
  - Premiums will be deducted from summer service/session pay, if available
  - Or the employee will be setup in Benefits Billing and sent a bill
- What if the employee does not pay their Benefits Billing?
  - Coverage will be terminated
  - Employee cannot re-enroll in benefits unless there is a qualifying life event, Open Enrollment opportunity, or will have to apply through Evidence of Insurability\*

\*Re-enrollment opportunities vary by plan

# Summer Prepay

## Resources:

### Employee:

- [Summer Prepay Insurance Premiums web page](#)
- [Benefit Premiums web page](#)

### Administrators:

- UW System HR/Benefits Administrative Resources: [Summer Prepay Resources web page](#)
  - Policy
  - Quick Reference Guide
- UW-Shared Services: [Summer Prepay landing web page](#)
  - Timeline
  - KBs
  - Communications

# Questions?



# Ticket Reminder

When sending an email to service operations, [serviceoperations@support.wisconsin.edu](mailto:serviceoperations@support.wisconsin.edu), 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](mailto:uwss-svc.CampusCallSlides@uwss.wisconsin.edu)