

# Institution Administrator Call

May 25, 2023

# Agenda

- Portal Articles
- Upcoming Training
- Summer Pay Deductions
- Affordable Care Act Filing Errors
- Income Continuation Insurance Program Changes
- Department Position Level Funding
- Test Rollover for Funding-Date Reminders
- CAT Annual and Hourly Basis Rate Loads
- Outside Activity Report Updates
- Faculty Sabbatical HRS Process- Reminder

# Portal Articles

## Recently posted:

- [Integrity Hotline Available to Faculty, Staff and Students](#)
- [May 29 is Edvest College Savings Plan 529 Day](#)
- [Submit Leave Reports by June 30, 2023](#)
- [Update on COVID-19 Test and Vaccine Coverage Information](#)

## Upcoming articles:

- UW 403(b) Supplemental Retirement Program (SRP)
- Bank Unused Vacation Hours

# Upcoming Training

- HR
  - 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://www.wisconsin.edu)

# Summer Pay Deductions

## Reminders:

- Flexible Spending Account (FSA) and Health Savings Account (HSA) employee contributions
  - With the transition to biweekly payroll, FSA and HSA employee contributions are deducted from all paychecks (A and B) including summer service and summer session
  - FSA only: Employees do not have the option to adjust their annual election unless they have a qualifying life change event
  - HSA only: Employees may adjust their contributions to their HSA through the standard process if they do not want contributions deducted from their summer pay
  - Deductions from summer paychecks helps to reduce the deduction amount in the fall when the employee returns
  - Deductions will automatically adjust in the fall based on contribution election, amount deducted year-to-date, and the number of pay periods remaining for the year
- HSA employer contribution and Health Opt-Out Incentive
  - HSA employer contributions
    - Processed on all A and B checks during the summer for C-basis employees and remitted to Optum
  - Health Opt-Out Incentive
    - Processed on all A and B checks during the summer for C-basis employees

# Summer Pay Deductions

- UW 403(b) Supplemental Retirement Program (SRP) and Wisconsin Deferred Compensation (WDC) 457 Program
  - With the transition to biweekly payroll, SRP and WDC Program contributions are deducted from all paychecks including summer service and summer session
  - Employees may adjust their contributions to these programs through the standard process if they do not want contributions deducted from their summer pay

# Summer Pay Deductions

- C-basis employees summer paychecks and Summer Prepays
  - Prior to Single Payroll summer paychecks were processed separately.
  - Now that summer paychecks are part of the standard payroll cycle C-basis employees who have summer paychecks see the movement of summer prepay funds on their paycheck from the prepay code to the applicable insurance deduction code

June 1, 2023 Paycheck

BEFORE-TAX DEDUCTIONS			AFTER-TAX DEDUCTIONS		
Description	Current	YTD	Description	Current	YTD
Access-In State & Dental	130.00	1,300.00			
DeltaVision	2.86	28.60			
Fidelity	100.00	1,100.00			
Wisconsin Retirement System	182.39	2,002.71			
Prepaid Before-Tax	132.86	797.16			
<b>TOTAL:</b>	<b>548.11</b>	<b>5,228.47</b>	<b>TOTAL:</b>	<b>0.00</b>	<b>0.00</b>

June 15, 2023 Paycheck

BEFORE-TAX DEDUCTIONS			AFTER-TAX DEDUCTIONS		
Description	Current	YTD	Description	Current	YTD
Access-In State & Dental	130.00	1,430.00			
DeltaVision	2.86	31.46			
Fidelity	100.00	1,200.00			
Wisconsin Retirement System	127.67	2,130.38			
Prepaid Before-Tax	-132.86	664.30			
<b>TOTAL:</b>	<b>227.67</b>	<b>5,456.14</b>	<b>TOTAL:</b>	<b>0.00</b>	<b>0.00</b>

# Questions?





# Affordable Care Act Filing Errors

- Annually the IRS requires employers to submit information about employee eligibility for health insurance under the Affordable Care Act (ACA). This information includes an employee's full name and Social Security Number (SSN).
- The IRS confirmed receipt of our ACA submission and indicated there were **151** active employees included on the filing with a full name and/or SSN that differs from IRS records.

# Affordable Care Act Filing Errors

## Summary by Institution:

Institution	Number of Affected Employees
UW-Eau Claire	1
UW-Green Bay	1
UW-Madison	131
UW-Milwaukee	8
UW Oshkosh	1
UW-Parkside	1
UW-Platteville	2
UW-River Falls	1
UW-Whitewater	4
UW System Administration	1

# Affordable Care Act Filing Errors

## **Action Required:**

Each institution (HR administrator) with affected employees should work directly with the employee to obtain a new paper Form W-4 via U.S. Mail. The new Form W-4 should then be compared to the employee's full name and SSN as it appears in HRS.

## **What is the purpose of obtaining a new Form W-4?**

To ensure the full name and SSN are accurate for required reporting going forward.

## **What if the employee does not return a new Form W-4?**

Document the effort to obtain a new Form W-4. No further action is necessary. The employee should not be contacted more than once.

# Affordable Care Act Filing Errors

## What if the information on the new Form W-4 are the same as in HRS?

Update the withholdings, if necessary, then file the form in the employee's file. No further action is necessary.

## What if the name or SSN on the new Form W-4 differ from HRS?

To correct name, email [serviceoperations@support.wisconsin.edu](mailto:serviceoperations@support.wisconsin.edu)

To correct SSN, do so in HRS then:

- Email [serviceoperations@support.wisconsin.edu](mailto:serviceoperations@support.wisconsin.edu) to indicate that the SSN needs to be updated. Do not email the SSN.
- Complete the [ETF Employee Identification Correction/Change Form \(ET-2810\)](#). Leave the agent signature blank.
- Fax the ETF form and a copy of the new Form W-4 to UW-Shared Services, Service Operations (reference the ticket number).

# Affordable Care Act Filing Errors

## Next Steps for UW System Human Resources:

Will send the report with the IRS errors to the affected institutions with a template letter to send to the employee's that explains the reason for the request for a new Form W-4.

## Next Steps for Institution HR Administrators:

Send the letter and a blank Form W-4 to the affected employees via U.S. Mail **by June 23**. If necessary, work with UW-Shared Services, Service Operations to update the information in HRS.

Contact UW System Human Resources at [uwshr@uwsa.edu](mailto:uwshr@uwsa.edu) with questions.

# Questions?



# Income Continuation Insurance Program Changes

Effective February 1, 2024:

- Standard and Supplemental Income Continuation Insurance (ICI) coverages will be consolidated into one coverage level
  - Employees enrolled in ICI will be automatically covered for earnings up to \$120,000
  - Employers will contribute a portion of the premium for the full amount of an employee's earnings (if eligible), up to \$120,000 per year (currently there is no employer contribution to supplemental coverage)
  - Since Supplemental coverage will no longer exist, a deferred enrollment period for supplemental coverage will no longer be offered each year

# Income Continuation Insurance Program Changes

Who is affected and how:

- Employees who have eligible earnings of more than \$64,000 who are not currently enrolled in supplemental coverage will be automatically enrolled in coverage up to \$120,000 per year. This group of employees will most likely have an increase in their premium.
- Coverage amount for employees currently enrolled in supplemental coverage will remain unchanged, but UW System will start paying a portion of the premium for coverage over \$64,000 (if eligible for the employer contribution)
- No affect on employees who earn less than \$64,000 annually
- Change does not provide a new enrollment opportunity for employees who don't have coverage. Employees may still enroll when they become eligible for deferred coverage or by applying through evidence of insurability.

*Employees will not need to take any action unless they wish to cancel their ICI coverage.*



# Income Continuation Insurance Program Changes

## Communications:

- September 2023: Portal article notifying employees of the change
- September/October 2023: Include general information with ABE communications
- January 2024: Portal article and email to affected employees to be included with annual notification of premium change information
- ICI web page and materials will be updated to reflect the single coverage level

## Questions:

- Contact [uwshr@uwsa.edu](mailto:uwshr@uwsa.edu)

# Questions?



# Department/Position Level Funding

Salary funding level reminders as changes or updates are being made to the department structures for FY24:

- Employees are typically funded through Appointment level funding set up in HRS
- Department and Position level funding entries are used as back-up funding sources only when appointment level funding does not exist or does not cover the entire pay period
- When manually adding or changing Department or Position level funding for FY2024, the Effective Date must be 6/18/2023
  - This allows Department or Position level funding to be used if Appointment level funding is missing for any portion of the 7A pay period
  - This date is dependent on institutional academic calendars and will change every year

# Department/Position Level Funding

## For more information:

- Fiscal Year End Landing Page

<https://uwservice.wisconsin.edu/administration/fye>

- Funding Entry Guide

<https://uwservice.wisconsin.edu/docs/publications/fye-funding-entry-guide-2023.pdf>

- Add or Change Department Level Funding for an Appointing Department

<https://kb.uwss.wisconsin.edu/page.php?id=21728>

- Add or Change Position Level Funding for Employee's Salary Expense

<https://kb.uwss.wisconsin.edu/page.php?id=24144>

- Salary Funding Levels Assigned During Payroll Processing

<https://kb.uwss.wisconsin.edu/page.php?id=21872>

# Test Rollover for Funding - Date Reminders

[Fiscal Year End  
Landing Page](#)

June 2023	
JUNE 2 (4:00 PM) - 5	Budget Funding Data Entry and Direct Retro page lockout for: - FY2024 Funding Load from CAT - Test Rollover of FY2023 Funding to FY2024
JUNE 5 - 9	Campuses will receive CAT to CA and Test Funding Rollover Error Results for review ( <a href="#">Tipsheet</a> )
JUNE 8	6A Final Calc and Confirm
JUNE 16	Deadline to correct funding to avoid Funding Rollover errors (4pm)
JUNE 16 (4:00 PM) - 20	Budget Funding Data Entry and Direct Retro page lockout for: - Funding Rollover from FY2023 to FY2024
JUNE 17	Encumbrance Job Data rows loaded (H-basis only)
JUNE 19	UW-Madison Only: Salary Cost Transfers (SCTs) for FY2023 must be fully approved to guarantee entry into FY2023. After this date SCTs will be processed as time permits
JUNE 21 - 26	Campuses will receive Final Funding Rollover Results for review ( <a href="#">Tipsheet</a> )  Reminder: Enter Funding for Job Data entries after funding lockout ( <a href="#">Tipsheet</a> )
JUNE 22	6B Final Calc and Confirm
JUNE 23	Encumbrance balances set to zero for FY2023
JUNE 23 - JULY 1	Encumbrance calculations on hold
JUNE 24	Encumbrance Job Data rows loaded A-basis only)
JUNE 30	Encumbrance balances initialized for FY2024

# Questions?



# CAT Annual and Hourly Basis Rate Loads

- A & H Basis CAT Rate Load
  - All Non-Merit increases will be loaded on Wednesday, June 7th
  - Action Reason Codes 019 (Merit-Pay Plan Only) and 067 (Chancellor's Discretion) will not be loaded as these should be used for pay plan purposes only
  - Output files will be distributed to HR directors and general HR contacts during the week of June 12th
- C Basis CAT Rate Load will be processed mid-August

# Outside Activity Report Updates

- OAR Clean Up Continues
  - Reports To changes are updated daily to reroute approval notice
  - On May 16, 2023, 133 emails were sent out to supervisors to approve OAR forms
    - At that time, there were about 300 employees OAR forms needing approval
  - Today (May 25, 2023) an email was sent again to employees with their supervisors also on the email
  - Tomorrow (May 26, 2023) a report will be sent to the institution OAR contacts of employees who have yet to submit and supervisors who have yet to approve for institution review
  - We will continue to send out reports as needed to institutions after this week



# Faculty Sabbatical HRS Process- Reminder

## Faculty Sabbatical Program-UWS Administrative Policy 160

Two types of sabbatical leaves are available to faculty members:

1. A faculty member may take a sabbatical leave for an academic year and receive from the institution financial support at any level up to sixty-five percent of his/her full compensation for that period, in accordance with institutional policies
2. A faculty member may take a sabbatical leave for one semester of the academic year and receive from the institution financial support at any level up to a maximum of his/her full compensation for that period

# Full Academic Year Sabbatical

A faculty member:

- Receive financial support from the UW institution at any level up to 65% percent of his/her full compensation for that period
- Could secure a buy out from an outside source for up to a 35% reduction
- Maintains 100% full-time rate for WRS (earnings, creditable service, contributions) and Absence accruals while on a faculty sabbatical

Procedure:

- Record the faculty sabbatical on the Profile Management Page in HRS
- Change FTE on Position (FTE is changed to 65% of the full FTE amount, or in the case of a buy out, the FTE change could be up to 99%)
- Enter an Additional Pay (earnings code USB) for both hours and pay to make the employee whole for WRS and Absence accruals

# One Semester Faculty Sabbatical

A faculty member:

- Approved to take a sabbatical for one semester of the academic year and receive from the institution financial support at any level up to a maximum of his/her full compensation for that period

Procedure:

- Record the faculty sabbatical on the Profile Management Page in HRS
- Add a job row to record the one-semester sabbatical leave
- Faculty receiving full compensation
  - No FTE change needed
  - No additional pay USB earnings code needed

# Resources

- [UW System Administrative Policy 160: The Faculty Sabbatical Program](#)
- HRS Process Supporting KBs
  - [Entering a Faculty Sabbatical in HRS \(KB 17072\)](#)
  - [Entering Person Profile Management in HRS \(KB 16269\)](#)
  - [Managing Position Data in HRS \(KB 16273\)](#)
  - [Entering Additional Pay in HRS \(KB 17094\)](#)

# Entering Return from Sabbatical

- Employees returning from sabbatical at the end of spring semester and will work in the summer may need a return row added if not previously entered
- Example – Academic Year Faculty Contract Period Ends 5/21/2023
  - Enter a return row with the effective date of 5/22/2023 in Job Data with the Action/Reason Return from Leave/Return from Leave
  - Next a Short Work Break Row should be entered for the same date using the next sequence number
- Submit a ticket if you need assistance with the action

# 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)