

# Institution Administrator Call

July 20, 2023

# Agenda

- Portal Articles
- Upcoming Training
- ETF Attestation Form
- Employee Termination Dates
- TAM – Request for Confidentiality Default Updated
- SH Supervisory Org Structure in Workday Preparation
- Craftworker CBA Implementation

# Portal Articles

## Recently posted:

- [Review Your Beneficiary Designations](#)

## Upcoming articles:

- Register for Your Flu Vaccine Appointment
- Annual Benefits Enrollment Period

# Upcoming Training

- TAM
  - Recruiting in TAM (Remote online)
    - Friday, August 11, 8:30am-4:00pm
- PY
  - Additional Pay (Remote / In Person)
    - Friday, July 28, 8:30am-12:30pm
- FN
  - Setting Up Funding (Remote online)
    - Thursday, August 3, 9:00am-12:00pm
  - Changing Funding (Remote online)
    - Friday, August 4, 9:00am-12:00pm
  - Direct Retro (Remote online)
    - Tuesday, August 8, 8:30am-11:30am

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

# ETF Attestation Form

The Department of Employee Trust Funds (ETF) has created the [Employer Attestation for Documentation Received web page](#) for the following:

- Employer Attestation for Documentation Received Form (ET-1908)
- Employer Attestation for Documentation Received Form secure submission link

ETF created the new form for employers to verify they have viewed an employees or dependents original documentation when required for verifying benefits coverage eligibility due to a qualifying life event.

This is because Wisconsin law prohibits ETF from receiving copies of vital records, including digital copies.

# ETF Attestation Form

## Who is responsible for completing the electronic form?

- For the institutions using benefits counseling services, this will be the responsibility of the **benefits counseling team**
- For the institutions not using benefits counseling services, this will be the responsibility of the **benefits administrator** that meets with the employee, either in-person or virtually

# ETF Attestation Form

## What information should you verify when you view the documentation?

- Confirm the **name** of the employee matches the name on the documentation
- Confirm the **date** the employee provided aligns with the date on the documentation (for example: date of birth or marriage or divorce)
- Use your best judgement to confirm that the documentation is an **original**

## How should the form be completed and submitted?

- For the institutions using benefits counseling services, the counseling team will complete the form and submit it to UW-Shared Services, Service Operations with the insurance application. Benefits Service Delivery Team will submit to ETF.
- For the institutions using benefits service delivery services only, complete the form and submit it to UW-Shared Services, Service Operations with the insurance application. Benefits Service Delivery Team will submit to ETF.
- For the institutions not using benefits counseling or benefits service delivery services, complete the form and submit through the secure submission link provided on [ETF's Employer Attestation for Documentation Received web page](#).

# ETF Attestation Form

**Should the documentation be submitted with the attestation form?**

No. Do not send the documentation with the attestation form.

## Resources:

- [Benefits Application & Form Distribution Chart](#)
  - Chart has been updated to include directions on where to submit the form
  - Chart is on the HR/Benefits Administrative Resources website on the below pages
    - [Family Changes web page](#)
    - [Employment Changes web page](#)
- Employer Attestation Form (ET-1908)
  - Form is linked on the HR/Benefits Administrative Resources website on the [Family Changes web page](#)



# Questions



# 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 resigning 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 accepts a position outside of the UW System and submits their resignation letter April 7, 2023. The end of the academic year was May 19, 2023. The employee does not have a summer contract. In the resignation letter the employee states they want their last day to be August 14, 2023. What is the employee's termination date?
  - A: August 14, 2023. Employees can choose when their last day is.
  - B: April 7, 2023. The day the employee provided their resignation notice.
  - C: May 19, 2023. The end of the academic year, when the employee last rendered service.

# Employee Termination Dates

- **Scenario 1 Answer: C**

A. August 14, 2023. This is wrong because while rules 1 and 4 allow the employer to recognize a resignation based on the employee's preferred termination date, the rules require that the termination must be the EARLIEST of the dates derived from the rules. May 19, 2023 is the earliest date based on the rules.

B. April 7, 2023. This is wrong because while it is the date the employee submitted their letter, the resignation was not effective immediately. The employee continued to be employed after this date. If we terminated the employee on April 7, 2023, they would not be able to work for us or be paid through the end of the semester. We are also not allowed to retroactively terminate the employee after they worked for us from April 7, 2023 through the end of the semester.

C. **May 19, 2023.** This is the last date for which the employee receives earnings for services rendered to the employer. This is the date required by rule 3. This is the correct answer.

# Employee Termination Dates

- **Scenario 2:** C-Basis employee intends to work in the fall of 2024. The employee does not have a summer contact. The last day of the spring semester was May 19, 2023. The employee accepts another position outside of the UW System and submits their resignation notice to their department on June 14, 2023. HR receives the notice on July 5, 2023. What should the employee's termination be?
  - A: June 14, 2023. The date the employee submitted their resignation notice.
  - B: May 19, 2023. The date the spring semester ended.
  - C: July 5, 2023. The date HR received the resignation notice.

# Employee Termination Dates

- **Scenario 2 Answer: A**

**A. June 14, 2023.** This is the correct date. It is sufficient that the employee provided notice to their supervisor, the fact that the notice took several days to reach HR does not change the effective date of the termination.

**B. May 19, 2023.** This is wrong because the employee was on an approved leave of absence after the end of the semester. This illustrates the key difference between this question and the previous question. In this question, the employee was expected to continue working in the fall, and was subsequently on a leave of absence during the summer. What makes a “leave of absence” a “leave of absence” (or a short work break as we refer to the summer break period) is that there is an expectation on both sides that employment will continue in the future. If there is not an expectation that employment will resume, then an employee can’t be on a “leave of absence”.

**C. July 5, 2023.** As mentioned above- providing notice to the supervisor is sufficient to meet the requirement of providing notice to the employer. However long it takes us to route it internally doesn’t change the fact that the employer received notice of the resignation on June 14, 2023.



# Employee Termination Dates

- **Scenario 3:** C-Basis employee decides they will retire after the spring 2023 semester which ends May 19, 2023. The employee does not have a summer 2023 contract. The employee submits their resignation notice to their department September 12, 2022 stating they want their termination date to be August 2, 2023. What should the employee's retirement date be?
  - A: August 2, 2023. Employees who retire can choose when their last day is.
  - B: May 19, 2023. The end of the spring semester since it is the last day they will render service for the UW System.
  - C: September 12, 2022. The date the employee informed their department.

# Employee Termination Dates

- **Scenario 3 Answer: B**

A. August 2, 2023. This is wrong because the employee cannot, by expressing a delayed effective date, create a leave of absence for purposes of the rules when a leave of absence would not otherwise exist. We have to use the earliest calculated date. The employee's last day of paid service would be the last day of the Spring semester. We do not intend for them to come back to work in the fall, and they do not intend to come back in the fall, so we cannot put them on a leave of absence for the summer. For that reason, the August 2 date is not an option.

**B. May 19, 2023.** This is the correct answer. This is the last day the employee was paid for rendering services and the employee was not on an unpaid leave of absence after this date.

C. September 12, 2022. This is wrong because while it is the date the employee submitted their letter, the resignation was not effective immediately. The employee continued to be employed after this date. If we terminated the employee on September 12th, they would not be able to work for us or be paid through the end of the academic year. We are also not allowed to retroactively terminate the employee after they worked for us from September 12<sup>th</sup> through the end of the academic year.

# Employee Termination Dates

- **Scenario 4:** C-Basis employee decides after their summer 2023 appointment that ends on August 18, 2023 they will retire. The employee informs their department and HR on August 12, 2022 they want their retirement date to be September 2, 2023. What is the employee's retirement date?
  - A: September 2, 2023. Employees who work a summer contract and can decide when their retirement date is.
  - B: May 19, 2023. The employee can't work during the summer since they are not returning in the fall. Their retirement date needs to be when the spring semester ended.
  - C: August 18, 2023. The last day the employee rendered service.

# Employee Termination Dates

- Scenario 4 Answer: C
  - A. September 2, 2023. This is wrong for the same reasons the delayed dates in several of the other examples are wrong. Even though the employee only wants to delay the effective date for a few weeks, there is no basis to do so. The employee will last provide service on August 18<sup>th</sup>. Neither they nor we have any intent that they will return to work in the future, so they are not on a leave of absence between August 18<sup>th</sup> and September 2<sup>nd</sup>. The earliest available date under the rules is August 18<sup>th</sup>, and we must use this date.
  - B. May 2023. This is wrong because the employee will work during the summer, and we are not allowed to retroactively terminate an employee. The intent of an employee to retire after the summer session ends does not prevent them from receiving a summer appointment.
  - C. **August 18, 2023.** This is the correct date. It is the last day on which the employee will be paid for rendering service to the employer.

# 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 76<sup>th</sup> 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

# Questions



# TAM – Request for Confidentiality Default Updated

- The Request for Confidentiality question now defaults to N
  - *Please do not publicly reveal my name in response to a public records request. (I acknowledge that if I am the successful candidate, my name will be released upon request.)*

The screenshot displays the 'Apply for Job' interface for an 'HR Generalist' position. The top navigation bar includes a back arrow labeled 'Exit' and the text 'Apply for Job'. Below the job title, a progress indicator shows seven steps: 1. Start (Complete), 2. Resume/Curriculum Vitae (Complete), 3. Attachments (Complete), 4. Preferences (Optional) (Complete), 5. Online Questionnaire (Complete), 6. References (Complete), and 7. Request for Confidentiality (In Progress). A 'Frequently Asked Questions' link is visible above the main content area. The main content area is titled 'Step 7 of 9: Request for Confidentiality' and contains the following text: 'Wisconsin Statute 19.36(7)(b) provides that applicants for positions may indicate in writing that his or her identity should be kept confidential. In response to a public records request, the University will not reveal the identities of applicants who request confidentiality in writing, except that the identity of the successful candidate will be released. See Wisconsin Statutes §19.36 (7)(a)'. Below this text are two radio button options: 'You may publicly reveal my name in response to a public records request as an applicant for this position.' (unselected) and 'Please do not publicly reveal my name in response to a public records request. (I acknowledge that if I am the successful candidate, name will be released upon request.)' (selected). A 'Rectangular Sn' watermark is present on the right side of the form.

# SH Supervisory Org Structure in Workday Preparation

- Background
  - Reporting relationships in HRS are used to create the Workday supervisory organization structure
  - The sup org structure created is based on Reports To in HRS
  - Governance decision was made to require Reports To on SH which will create the Student Hourly Job Management sup orgs
- Current State
  - Most SH employees do not have a Reports To in HRS
  - Need to create data point in HRS to determine who is supervising SH employees



# SH Supervisory Org Structure in Workday Preparation

- Requirements
  - The Reports To will need to be non-SH employee
  - The Reports To will need to have a position
- Options to meet the December 1, 2023 goal of all SH employees having a Reports To in HRS
  - Enter Reports To for all newly hired SH employee starting now
  - Request a mass upload template now to be delivered by August 1, 2023
  - Request ad hoc template(s) after August 1, 2023 – October 23, 2023
  - Final mass upload templates will be distributed to campuses on November 1, 2023

## SH Supervisory Org Structure in Workday Preparation

- Enter Reports To for all newly hired SH employees starting now
  - Current SH hiring - update business process to add a Reports To for all SH employees
- Request a mass upload template now to be delivered by August 1, 2023
  - Make a request in the chat for your campus or submit a ticket to [serviceoperations@support.wisconsin.edu](mailto:serviceoperations@support.wisconsin.edu) and UWSS will provide a mass upload template for your campus for SH employees missing their Reports To
  - Campuses return completed templates via ticket and UWSS processes mass upload to populate Reports To

## SH Supervisory Org Structure in Workday Preparation

- Request ad hoc templates after August 1, 2023 – October 23, 2023
  - Submit a ticket to [serviceoperations@support.wisconsin.edu](mailto:serviceoperations@support.wisconsin.edu) and UWSS will provide a mass upload template for your campus for SH employees missing their Reports To
  - Campuses return completed templates via ticket and UWSS processes mass upload to populate Reports To
- Final mass upload templates will be provided to campuses on November 1, 2023
  - Remaining SH population that needs to be populated
  - Return data via ticket to [serviceoperations@support.wisconsin.edu](mailto:serviceoperations@support.wisconsin.edu) by November 27, 2023

# SH Supervisory Org Structure in Workday Preparation

- Mass upload template sample
  - The template will include the primary TL Approver, which may be the same as the Reports To

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	P	Q	R	S
	Empl ID	Empl Rcd	Employee Name	Position Number	Job Code	Job Code Des	Empl Class	Pay Group	EJED	Dept ID	TL Approver	Approver Empl ID	Approver Empl Rcd	Approver Position #	Action	Action Reason	Effective Date	Reports TO
1																		
2															DTA	088 - Change Reports To		
3															POS	38 - Change Reports To		

# SH Supervisory Org Structure in Workday Preparation

- Under Review
  - Peoplesoft query/WED
  - Smart HR Template – add Reports To field
  - Will provide additional updates on August 3, 2023 institutional call
- Reports To Entry Reminders
  - SH employees that have a position, the Reports To should be added on Position Data
  - SH employees that don't have a position, which is the majority of the SH population, Reports To is added on Job Data

# Questions?



# 2023 Craftworker Collective Bargaining Agreement (CBA) Implementation

- General Wage Adjustment (GWA) Points of Information
  - Effective date is 01/01/2023 and is 4.7%
  - UWS includes CP Trades employees
  - MSN includes CP and CJ Trades employees
  - UWS and MSN – CLs are not represented and do not receive increases
  - Employees that are Empl Status: L will not receive the lump payment until returned to paid status.
  - Employees that retired or died after January 1, 2023 are eligible for wage adjustment and lump sum payment

# 2023 Craftworker Collective Bargaining Agreement (CBA) Implementation

- Proposed Timeline
  - Monday, July, 31, 2023 – Population sent to CHROs and campus HR contacts
    - Includes the current comp rate and the new comp rate
  - Wednesday, August 9, 2023 – UWSS inserts Job Data row using Effective Date: **07/16/2023**, Action: PAY (Pay Rate Change), Action Reason: 020 (Trades Contract GWA) for the 8A payroll paid August 24, 2023
  - Thursday, August 10, 2023 – Pay plan letters are created and sent to non-MSN employees and uploaded to ePfile
  - Lump sum for wages between January 1, 2023 and July 15, 2023 paid on the 8B payroll paid September 7, 2023



# 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)