INSTITUTION ADMINISTRATOR CALL

November 22, 2023

AGENDA

- Portal Articles
- Upcoming Employee Emails
- Upcoming Training
- 2024 Social Security Wage Base Increase
- New State Tax Withholding
- UIA Life Insurance 2024 Plan Year Updates and Annual Process
- ICI Deferred Enrollment and Sick Leave Swap
- Banked Leave Eligibility for University Staff
- Website Review – Feedback on use of select HR Forms

PORTAL ARTICLES

Recently Posted

- Review/Update Your Address and Personal Information
  Review and update your personal information, address and payroll information.

- University Staff: Use Paid Leave Before Year-End
  Schedule paid leave now to avoid losing hours not eligible for carry over into 2024.

- Reminder: Deadlines for Submitting Your Flexible Spending Account Claims
  Make sure you meet the deadlines to incur and submit eligible expenses.

- What is an Explanation of Benefits (EOB)?
  An (EOB) shows claims information about the services provided during your health or dental visits.

- 2024 Social Security Tax Wage Base Increase
  The Social Security Tax wage base will increase in 2024.

- Benefit Insurance Premiums: Deduction Schedule Change
  Starting in 2024, the payroll deduction schedule for most benefits will be changing.

PORTAL ARTICLES

Upcoming Articles

- Supplemental Retirement Plan Contribution Limits for 2024
- ICI Coverage Level Changes
- University Staff: Bank or Request Payout of Unused Vacation by December 31, 2023

UPCOMING EMPLOYEE EMAILS

Employee Emails	Scheduled Distribution
• Address review/update for inactive employees	11-26
• UW Employees, Inc. plan termination notification to current participants	11-27
• Electronic consent opportunity for tax form distribution	12-3
• Electronic non-consent option to employees who currently have consent	12-5
• Benefit insurance premiums: deduction schedule change – 12-month employees & 9-month employees not enrolled in HDHP	12-8
• Address review/update for inactive employees	12-10

Note: Scheduled distribution dates are subject to change.

UPCOMING TRAININGS

- TAM
  - Recruiting in TAM (Remote online)
    - Friday, December 1, 8:30am-4:00pm
- Finance
  - Changing Funding (Remote online)
    - Thursday, December 7, 9:00am-12pm
  - Setting up Funding (Remote online)
    - Friday, December 8, 9:00am-12pm

My Learning Path

REMINDER: 2024 SOCIAL SECURITY WAGE BASE INCREASE

- The Social Security Administration announced the 2024 social security wage base will be $168,600
  - This is an increase of $8,400, up from $160,200 in 2023
  - Maximum withholding for 2024 is $10,453.20, which is 6.2% of the first $168,600 in taxable wages.
- Reminder: There is no wage limit for Medicare withholding; all taxable wages are subject to the 1.45% tax
  - Wages in excess of $200,000 will be subject to an additional 0.9% tax

STATE TAX WITHHOLDING

- The Universities of Wisconsin will now be registered in the following **19 states**:

Wisconsin	Idaho *(new)*	Massachusetts	North Carolina
Arizona	Illinois	Michigan	South Carolina
California	Iowa	Minnesota	Utah
Connecticut	Louisiana *(new)*	Montana	Virginia
Georgia	Maine *(new)*	Nebraska	

NEW STATE TAX WITHHOLDING

- UWSS will send out an email notification on Monday, December 11, 2023, to all active employees with an approved Remote Work Agreement or a home or mailing address in **Idaho**, **Louisiana**, or **Maine**.

- All W-4s can be updated through Self-Service. Initial paper forms are no longer required.
  - Idaho ID W-4
  - Louisiana L-4
  - Maine W-4ME

NEW STATE TAX WITHHOLDING

- Elections for Idaho, Louisiana, or Maine withholding can be entered into HRS on Wednesday, December 27, 2023, to be effective for 2024 payrolls.

- Administrators must date all entries with an effective date of **January 01, 2024**, or after.

- Instructions for entry in HRS can be found in KB-16889

NEW STATE TAX WITHHOLDING

- Review Paycheck/Paycheck Taxes & Earnings Statement

  - New state withholding can be viewed in the Tax Section of Review Paycheck.

  - Employees will see a new withholding line on their Earnings Statement.

QUESTIONS?

UNIVERSITY INSURANCE ASSOCIATION (UIA) LIFE INSURANCE 2024 PLAN YEAR UPDATES AND ANNUAL PROCESS

- University Insurance Association (UIA) Life Insurance Eligibility:
  - Faculty, Academic Staff, Limited Appointees (FA/AS/LI)
  - Actively employed on January 1 of the deduction year
  - Meet the minimum monthly salary threshold – for 2024 plan year the threshold is $3,043 per month (increase from $2,952 from 2023)
  - Lump Sum, Ad Hoc (Zero Dollar) and inactive appointments (summer service/session) are not factored into the monthly salary
- Eligibility is reviewed annually
- Premium deduction will be on the January 25, 2024 paycheck
  - Premium remains the same at $38.40 for 2024 plan year

UNIVERSITY INSURANCE ASSOCIATION (UIA) LIFE INSURANCE 2024 PLAN YEAR UPDATES AND ANNUAL PROCESS

- Communications:
  - Conversion Notice: Employees who have coverage and do not qualify for the 2024 plan year will be sent conversion information by January 10, 2024
  - Benefits Billing: Employees on LOA that meet the annual qualifications will be sent a Benefits Billing Statement along with a reminder in February
    - Employees who have not paid by February 29, 2024 (received by) will have coverage terminated as of December 31, 2023
  - Continuation and Conversion Notices: Employees who leave employment will be sent continuation (retirees) or conversion (terminations) information through the COBRA process
  - Portal Article: Mid-December – Premium deduction will occur on the January 25, 2024 paycheck

UNIVERSITY INSURANCE ASSOCIATION (UIA) LIFE INSURANCE 2024 PLAN YEAR UPDATES AND ANNUAL PROCESS

- UIA process will be run January 8, 2024

- UIA events created effective January 1, 2024
  - Only employees whose eligibility has changed will get an event:
    - Eligible Empl Classes: FA/AS/LI/OT1
    - Excluded: Lump Sum or FTE equal to 0.000250
    - Eligibility Field 5 will be updated with a Y or N

UNIVERSITY INSURANCE ASSOCIATION (UIA) LIFE INSURANCE 2024 PLAN YEAR UPDATES AND ANNUAL PROCESS

- Reminders:
  - Annual premium is $38.40
  - Employees enrolled in coverage who terminate have coverage through December 31 following their last day of employment

- Communications:
  - Portal article – mid December

- Resources:
  - UIA web page: University Insurance Association Life Insurance web page
  - Questions: Contact UW System HR at uwshr@uwsa.edu

Send your questions to uwshr@uwsa.edu

ICI DEFERRED ENROLLMENT AND SICK LEAVE SWAP

- Annually eligible employees are allowed an Income Continuation (ICI) deferred enrollment opportunity based on accrued sick leave hours

- University Staff employees can enroll in ICI the first time sick leave balances reach the levels outlined below as of the December B paycheck (pay period end 12/16/2023)

ICI Category	Sick Leave Hours
University Staff – Category 3	Accrued at least 80 hours of unused sick leave during the calendar year*
University Staff – Category 4	Accrued 520 – 727 hours of unused sick leave
University Staff - Category 5	Accrued 728 – 1039 hours of unused sick leave
University Staff – Category 6	Accrued 1040 hours or more of unused sick leave (any year)

*Prorated based on FTE or sick leave earned

ICI DEFERRED ENROLLMENT AND SICK LEAVE SWAP

- ICI Resources:
  - UW System Employee Benefits website > ICI web page

- Additional information on the ICI processes and timeline will be provided early January

SICK LEAVE SWAP

- The opportunity to swap used sick leave for other leave can provide deferred enrollment opportunities into the ICI program or reduce ICI premiums for employees enrolled (change premium category).

- An employee may swap out used sick leave for unused leave (vacation, personal holiday, etc.).

- Sick Leave used to pay for health insurance premiums while on furlough *cannot* be swapped for other unused leave.

- Decision to notify employees of their eligibility to swap sick leave:

    - For institutions not on Benefits Counseling: Institution discretion to contact employees and determine threshold level.

    - For institutions on Benefits Counseling: Employees who are within 16 hours of reaching a category change will be contacted.

SICK LEAVE SWAP

- Deadlines for all leave swaps that will affect the ICI premium category:
  - Friday, December 29, 2023 (end of day): Leave swap request must be submitted by the *employee*.
  - Tuesday, January 2, 2024 (4:30 pm): *Institution* request must be submitted to Payroll Service Delivery (for institutions on Payroll Service Delivery).
  - Wednesday, January 3, 2024 (4:30 pm): *Payroll Administrators* must enter leave swap in HRS.
- The 2024 ICI premium category will not be affected by any leave swaps made after the ICI annual update process runs in January.
- December 1, 2023, the Projected Sick Leave Balance report will be available to institutions that choose to reach out to employees about sick leave swapping
  - Email: serviceoperations@support.wisconsin.edu to request the report for your institution

Send your questions to uwshr@uwsa.edu

BANKED LEAVE ELIGIBILITY – UNIVERSITY STAFF

- The eligibility for University Staff to bank unused vacation is based on the following:
  - Years of Service, FTE & FLSA Status -or-
  - Vacation Accrual Rate & Sick Leave Accumulation

University Staff Paid Leave Banking Schedule		
Years of Service	**Full-Time University Staff – Nonexempt**	**Full-Time University Staff – Exempt and Nonexempt Supervisors**
First 5 Years	0 hours	0 hours
5+ to 10 Years	0 hours	40 hours
10+ to 15 Years	40 hours	40 hours
15+ to 20 Years	40 hours	80 hours
20+ to 25 Years	80 hours	120 hours
25+ Years	120 hours	120 hours
Earn < 160 hrs of vacation & have accrued at least 520 hrs of sick leave	40 hours	40 hours

BANKED LEAVE ELIGIBILITY – UNIVERSITY STAFF

- Eligibility files along with the employee communication will be sent out soon
- Eligibility for employees is displayed in two places on their portal:
  - Absence balances within the timesheet
  - On the form under leave reports
- Entry for Banked Leave and cash payments must be dated and processed between 12/1 and 12/31
  - Self-service entry attempted prior to 12/1, even if using an effective date between 12/1 and 12/31, will generate an error upon submitting
- Entries dated and processed prior to the Dec A payroll confirmation will be paid on 12/14/23
- Entries dated and processed prior to the Dec B payroll confirmation will be paid on 12/28/23 (last check of the year)
  - It is **not** required that cash payments be included in the last paycheck of the calendar year.
- Entries dated and processed prior to the Dec C payroll confirmation will be paid on 01/11/24
- All forms received after 12/31/23 must be rejected

BANKED LEAVE ELIGIBILITY – UNIVERSITY STAFF

- References:
  - [Entering and Reviewing University Staff Annual Leave Conversion Processing in HRS](#)
  - [Employee Tip sheet: Entering Banked Leave Conversion Through Self-Service](#)
  - [Running the Banked Leave Annual Eligibility/Election Summary Report in HRS](#)
  - [Annual Leave Conversion Instructions](#)

- Policy:
  - [UW System Administrative Policy 1210 (formerly BN1): Vacation, Paid Leave Banks, and Vacation Cash Payouts](#)
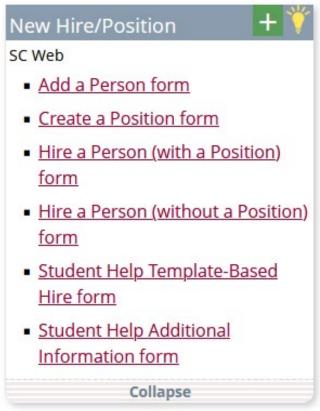 - [Madison Policy Library: Vacation](#)

QUESTIONS?

WEBSITE REVIEW – FEEDBACK ON USE OF SELECT HR FORMS

New Hire/Position

SC Web

- Add a Person form
- Create a Position form
- Hire a Person (with a Position) form
- Hire a Person (without a Position) form
- Student Help Template-Based Hire form
- Student Help Additional Information form

Collapse

Change Person/Position/Job Data

SC Web

- Change a Person form
- Change a Position form
- Employee/Dependent Death Processing
- Job Change (with a Position) form
- Job Change (without a Position) form

Collapse

These forms are located on the UW-Shared Services Administration website on the Human Resources Page which can be found alongside the other Functional Areas listed on the website.

HUMAN RESOURCES PAGE

Change Person/Position/Job Data

- Change a Person Form
- Change a position Form
- Job Change (with a position) form
- Job Change (Without a Position)

New Hire/Position

- Add a Person form
- Create a Position form
- Hire a Person (with a Position) form
- Hire a Person (without a Position) form
- Student Help Template-Based Hire form
- Student Help Additional Information form

QUESTIONS?

TICKET REMINDER

When sending an email to service operations, 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, please email
uwss-svc.CampusCallSlides@uwss.wisconsin.edu

THANK YOU