



# INSTITUTION ADMINISTRATOR CALL

May 9, 2024



# AGENDA

- Portal Articles
- Upcoming Trainings
- Employee Termination Dates
- 2024 Short Work Break Process
- CAT Annual And Hourly Basis Rate Loads
- Funding Page Lock Out Reminder
- Test Rollover Reminder
- Outside Activity Report Update
- Pay Plan Workshop
- Data Clean Up
- Position Inactivation Process Tentative Plan



# PORTAL ARTICLES

## Recently Posted

- [Review/Update Your Address and Personal Information](#)  
Review and update your personal information, including address and payroll information, to make sure all information is accurate.
- [2024 Benefit ID Cards](#)  
Are you using the right benefit ID card when you see your doctor, pick up a prescription, visit the dentist, or get your eyes checked? Make sure you have your ID cards prior to needing them.
- [Employee Well-being Webinars](#)  
Take care of your physical, emotional, and financial well-being by increasing your knowledge through webinars.

## Upcoming Articles

- Submit Leave Reports by June 30, 2024
- Parental Leave Policy



# UPCOMING TRAININGS

- Finance
  - Setting up Funding  
Thursday, May 16, 9am-12pm (remote)
  - Changing Funding  
Friday, May 17, 9am-12pm (remote)
  - Direct Retro  
Friday, May 31, 8:30am-12pm (remote)

[My Learning Path](#)



# 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 decides after their summer 2024 appointment that ends on August 16, 2024 they will retire. The employee informs their department and HR on October 20, 2023 they want their retirement date to be September 3, 2024. What is the employee's retirement date?

A: May 17, 2024. 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.

B: August 16, 2024. The last day the employee rendered service.

C: September 3, 2024. Employees who work a summer contract and can decide when their retirement date is.

Answer will be provided with explanation on follow up slides sent after the call.





# EMPLOYEE TERMINATION DATES

- Scenario 1 Answer: **B**
  - A. May 17, 2024. 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.
  - B. August 16, 2024.** This is the correct date. It is the last day on which the employee will be paid for rendering service to the employer.
  - C. September 3, 2024. 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 their summer appointment. 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 16, 2024. 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 16 and September 3. The earliest available date under the rules is August 16, and we must use this date.



# EMPLOYEE TERMINATION DATES

- **Scenario 2:** C-Basis employee decides they will retire after the spring 2025 semester which ends May 16, 2025. The employee does not have a summer 2025 contract. The employee submits their resignation notice to their department January 20, 2025 stating they want their termination date to be August 2, 2025. What should the employee's retirement date be?
  - A: January 20, 2025. The date the employee informed their department.
  - B: August 2, 2025. Employees who retire can choose when their last day is.
  - C: May 16, 2025. The end of the spring semester since it is the last day they will render service for the Universities of Wisconsin.

Answer will be provided with explanation on follow up slides sent after the call.



# EMPLOYEE TERMINATION DATES

- Scenario 2 Answer: **C**
  - A. January 20, 2025. 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 January 20, 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 January 20 through the end of the academic year.
  - B. August 2, 2025. 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.
  - C. **May 16, 2025.** 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.



# EMPLOYEE TERMINATION DATES

- **Scenario 3:** C-Basis employee accepts a position outside of the Universities of Wisconsin. The employee submits their resignation letter February 9, 2024 and intends to continue to work through the end of their contract. The end of the academic year is May 17, 2024. The employee does not have a summer contract. In the resignation letter the employee states they want their last day to be July 8, 2024. What is the employee's termination date?
  - A: July 8, 2024. Employees can choose when their last day is.
  - B: May 17, 2024. The end of the academic year, when the employee last rendered service.
  - C: February 9, 2024. The day the employee provided their resignation notice.

Answer will be provided with explanation on follow up slides sent after the call.



# EMPLOYEE TERMINATION DATES

- Scenario 3 Answer: **B**
  - A. July 8, 2024. 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 17, 2024 is the earliest date based on the rules.
  - B. May 17, 2024.** 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.
  - C. February 9, 2024. 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 February 9, 2024, 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 February 9, 2024 through the end of the semester.



# EMPLOYEE TERMINATION DATES

- **Scenario 4:** C-Basis employee intends to work in the fall of 2025. The employee does not have a summer contact. The last day of the spring semester was May 17, 2024. The employee accepts another position outside of the Universities of Wisconsin and submits their resignation notice to their department on June 10, 2024. HR receives the notice on July 8, 2024. What should the employee's termination be?

A: June 10, 2024. The date the employee submitted their resignation notice.

B: July 8, 2024. The date HR received the resignation notice.

C: May 17, 2024. The date the spring semester ended.

Answer will be provided with explanation on follow up slides sent after the call.



# EMPLOYEE TERMINATION DATES

- Scenario 4 Answer: **A**
  - A. June 10, 2024.** 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. July 8, 2024.** 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 10, 2024.
  - C. May 17, 2024.** 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 Scenario 3. 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".



# 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?





# 2024 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 18, 2024 (effective date is one day after the institution's end of academic year)
  - Action code: Short Work Break; Action Reason: 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



# CAT ANNUAL AND HOURLY BASIS RATE LOADS

- The Compensation Administration Tool (CAT) will be locked starting Friday, May 10, 2024
- A & H Basis CAT Rate Load
  - All Non-Merit increases will be loaded on Monday, June 3, 2024
  - Action Reason Codes 019 (Merit-Pay Plan Only) and 067 (Chancellor’s Discretion) are not loaded through as these should be used for Pay Plan purposes only
  - Output files will be distributed to HR Directors and Managers during the week of June 10, 2024
- C Basis CAT Rate Load will be processed Saturday, August 3, 2024

CAT Action Reasons	
Action Reason	
001 - Change in Duties/Title	
003 - Promotion/Progression	
006 - Equity	
010 - Schedule Change (ET,SA)	
011 - External Rate	
015 - Different Pay Basis	
016 - Prevailing Rate Setting	
022 - Market Factor - Outside Offer	
023 - Raise to Institution Minimum	
025 - Temporary Change in Duties	
030 - Due to Title Appeal	
031 - Re/Activated Rate	
035 - Raise to School/College Min	
051 - Structural Adjustment	
054 - New Title Assignment	
064 - Temporary Adjustment End	
075 - Temp Empl Increase	
080 - Market Factor - Competitive	
081 - Market Factor - Retention	
083 - Post Tenure Review Incmnt	
086 - Student Help Rate Change	
090 - Living Wage Adjustment	
091 - Performance	
092 - FLSA Adjustment	
100 - Ripple	



QUESTIONS?





# FUNDING PAGE LOCK OUT REMINDER

- Budget Funding Data Entry and Direct Retro page lockout begins at 4PM on Friday, May 10, 2024 for:
  - FY2025 Funding load from Compensation Administration Tool (CAT)
  - Test Rollover of FY2024 funding to FY2025
  - This is the first of two lockouts in May that will occur for the FY2025 rollover
- Funding Data Entry and Direct Retro pages will be available by the end of the day Monday, May 13, 2024



# TEST ROLLOVER REMINDER

## 2024 Fiscal Year End (HRS)

[Timeline](#)

[Calendar](#)

[Resources](#)

[Printable Calendar](#)

May 2024

MAY 1	Recommended earliest date to begin Fiscal Year (FY) 2025 funding entry ( <a href="#">Funding Entry Guide</a> )
MAY 10 (4:00 PM) - 13	Budget Funding Data Entry and Direct Retro page lockout for: - FY2025 Funding Load from CAT - Test Rollover of FY2024 Funding to FY2025
MAY 13 - 17	Campuses will receive CAT to CA and Test Funding Rollover Error Results for review
MAY 18 (2:00 AM)	Short Work Break Job Data row inserts
MAY 24	Deadline to correct funding to avoid Funding Rollover errors (4pm)
MAY 24 (4:00 PM) - JUNE 2	Budget Funding Data Entry and Direct Retro page lockout for: - Funding Rollover from FY2024 to FY2025



QUESTIONS?





# OUTSIDE ACTIVITY REPORT UPDATE

- OAR forms were due by April 30, 2024 for participating institutions
- Monday, May 6, 2024: Final reminder emails to employees who have yet to complete their forms (supervisors were copied)
- Wednesday, May 8, 2024: Approvers received final reminder of their outstanding approvals
- Friday, May 10, 2024: Report of incomplete forms and pending approvals will be sent to each institutions OAR contact and CHRO
- Monday, May 13, 2024: Final reports of incomplete forms and pending approvals will be sent to Office of Compliance and Risk Management (OCRM)





# PAY PLAN WORKSHOP

- Thursday, May 16, 2024, from 1pm-2:30pm
- Topics will include:
  - Timeline
  - Template review and instructions
  - Q and A
- Invite extended to the Institution Administrator call list



# PAY PLAN TIMELINE

- A & H Basis Pay Plan Templates are distributed by Tuesday, May 28, 2024
  - Due Friday, June 14, 2024
- FLSA Workbooks are distributed by Friday, May 17, 2024
  - Due Friday, June 14, 2024
- C Basis Pay Plan Templates are distributed by Thursday, July 18, 2024 - **Tentative**
  - Due Friday, August 2, 2024 – **Tentative**



# DATA CLEAN UP

- POIs in R and T were sent to institutions this week
- Position inactivation to begin
- Upcoming:
  - Sup Org maintenance to begin
  - Workshop will be held to review sup orgs and the associated clean up/maintenance



# POSITION INACTIVATION PROCESS TENTATIVE PLAN

- Position Management: Initiative underway to maintain *position numbers* at each institution in HRS by the end of the fiscal year
- UW-Shared Services will be pulling a list of active positions using a certain criteria to determine which position numbers will be inactivated
- Process currently being tested



# POSITION INACTIVATION PROCESS TENTATIVE PLAN

- Current Criteria for Inactivation
  - Most recent row on position data is December 31, 2023 or older
  - Position now has zero incumbents with last filled date of December 31, 2023 or older **OR** position was never filled
- Current Exclusions
  - Position has an associated job posting (open/pending approval statuses) in TAM that was created January 1, 2023 or newer
  - Position has an associated transaction in Manage Hires with a hire request status of “hired” or a desired start date of January 1, 2023 or newer
  - Summer Service/Summer Session positions that had an incumbent as of May 1, 2023 or newer (position used last summer)



# POSITION INACTIVATION PROCESS TENTATIVE PLAN

- Post Inactivation
  - After positions are inactivated, we will have a list of positions associated with each business unit that were inactivated
  - An inactivated position can be reactivated, if needed. This status can be updated in position data



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, please email  
[uwss-svc.CampusCallSlides@uwss.wisconsin.edu](mailto:uwss-svc.CampusCallSlides@uwss.wisconsin.edu)



THANK YOU