



INSTITUTION ADMINISTRATOR CALL

June 6, 2024



AGENDA

- Portal Articles
- Upcoming Trainings
- FYE Date Reminders
- Life Insurance Changes
- HR Summer Processing Timeline
- Data Cleanup



PORTAL ARTICLES

Recently Posted

- Employee Well-Being Webinars
- Parental Leave Policy
- Submit Leave Reports by June 30, 2024
- Beneficiary Designation Reminder



UPCOMING TRAININGS

- TAM
 - Recruiting in TAM
- Friday, June 21, 8:30am-4pm (remote)

[My Learning Path](#)



FYE Date Reminders

June 2024

JUNE 3 - 7	Campuses will receive Final Funding Rollover Results for review
JUNE 6	6A Final Calc and Confirm
JUNE 8	Encumbrance Job Data rows loaded (H-basis only)
JUNE 15	Encumbrance Job Data rows loaded (A-basis only)
JUNE 18	UW-Madison Only: Salary Cost Transfers (SCTs) for FY2024 must be fully approved to guarantee entry into FY2024. After this date SCTs will be processed as time permits
JUNE 20	6B Final Calc and Confirm
JUNE 21	Encumbrance balances set to zero for FY2024
JUNE 21 - JULY 5	Encumbrance calculations on hold

[Fiscal Year End landing page](#)



FYE Date Reminders

July 2024

JULY 5	Encumbrance balances initialized for FY2025
JULY 11	Last day to submit FY2024 Direct Retros for processing in HRS in FY2025; Direct Retro entry page locked at 4pm
JULY 15	Last day of Period 13, closed EOD
JULY 16	Direct Retro entry page unlocked
JULY 18	7A Final Calc and Confirm

August 2024

AUGUST 3	Job Data Pay Rate changes loaded from CAT (C basis only)
AUGUST 17 (2:00 AM)	Job Data row inserts: - Return from Short Work Break - Encumbrance (C-basis only)

[Fiscal Year End landing page](#)



QUESTIONS?





LIFE INSURANCE CHANGES

- UW Employees, Inc. (UWEI) Life Insurance and University Insurance Association (UIA) Life Insurance plans will terminate January 1, 2025
 - Employees enrolled in UWEI as of December 31, 2023, will continue to have coverage through December 31, 2024, at no cost.
 - Coverage for employees who separate from service during 2024 will end the last day of the month in which their termination occurs.
 - Employees enrolled in UIA on January 1, 2024, will have coverage through December 31, 2024, even if they leave employment prior to December 31, 2024. The 2024 annual premium was deducted on the January 25, 2024, paycheck. No additional premium is due for coverage.



LIFE INSURANCE CHANGES

Why the Plans are Ending

- Life insurance offerings were re-evaluated because of:
 - Move to centralized benefit enrollment with State of Wisconsin/ETF; requires review of plan administration
 - Need to simplify life insurance options available to employees
 - Multiple plans has led to:
 - Under selection of most valuable plans for employees.
 - Employees tend to chose low-cost option that has a declining value. Employees may be underinsured as needs change over time.



LIFE INSURANCE CHANGES

Options at Plan Termination

- Apply for Coverage through Evidence of Insurability (apply at any time, approval not guaranteed)
 - Enroll in or Increase existing coverage (up to plan limits)
 - State Group Life Insurance
 - Individual & Family Life Insurance
- Limited Conversion Rights
 - Employees and continuants enrolled in coverage when the plans terminate will have a limited conversion right if:
 - Insured for at least five (5) years; and
 - Not eligible for other group coverage that may become available within 31 days of plan termination date
 - Coverage amount limited to the lesser of:
 - amount of terminated coverage, or
 - \$10,000



LIFE INSURANCE CHANGES

Options at Plan Termination - Continued

- Enhanced Enrollment Opportunity - Individual & Family Life Insurance
 - Eligible active employees may enroll in or increase **employee** coverage up to \$100,000 in \$5,000 increments (not to exceed plan limits)
 - Proof of good health not required, approval guaranteed,
 - Offered *this fall* during Annual Benefits Enrollment (ABE). *Changes effective January 1, 2025.*
 - Enhanced enrollment not available for spouse/domestic partner and child coverage. Employees may apply to enroll or increase dependent coverage through evidence of insurability (approval not guaranteed).
 - Employees eligible for enhanced enrollment not eligible for limited conversion right since it qualifies as group coverage available within 31 days of the plan termination date



LIFE INSURANCE CHANGES

Options at Plan Termination - Continued

- Enhanced Enrollment Opportunity – State Group Life Insurance
(Contingent on successful implementation of Insurance Administration System)
 - Eligible active employees may enroll in or increase **employee** coverage up to **one level** (not to exceed plan limits)
 - Proof of good health not required, approval guaranteed,
 - Offered *fall of 2025* during Annual Benefits Enrollment (ABE). *Changes effective January 1, 2026.*
 - Enhanced enrollment not available for dependent coverage. Employees may apply to enroll or increase dependent coverage through evidence of insurability (approval not guaranteed).



LIFE INSURANCE CHANGES

Communications

- Information about the enhanced enrollment opportunity in Individual & Family Life coverage will be included in the emails and will be provided during Annual Benefits Enrollment (ABE).
- Employees enrolled in UW Employees, Inc. Life Insurance received an email in November 2023 informing them of the plan termination. A reminder email will be sent in September 2024.
- Employees enrolled in University Insurance Association Life Insurance will receive an email in September 2024 informing them of the plan termination.
 - Employees enrolled in the University Insurance Association Life Insurance who leave employment between January 2, 2024, and the date the email is distributed in September 2024 will receive notice of their limited conversion rights later in 2024.
 - Securian will send notice by mid-November via US Mail to University Insurance Association Life Insurance continuants (mainly retirees) who elected to continue coverage upon employment termination.



LIFE INSURANCE CHANGES

- **Employee Questions**

- Active employees will be directed to reach out to their benefits contact
- Continuants (mainly retirees) will be directed to reach out to Securian
- FAQ – Will be posted on the HR Administrators page to assist with employee questions

- **Resources**

- [Enrollment Deadline Worksheet](#) – UWEI and UIA Life Insurance removed for employees hired January 1, 2024, or later
- [UWEI web page](#)
- [UIA web page](#)
- [Benefits Brochure, Quick Guides, and Benefits Summaries for newly benefits eligible employees](#)
- [Life Events web pages and COBRA documents](#)

- **Institution resources**

- Please review and update materials where you may reference this plan (web pages, newly benefits eligible materials)



QUESTIONS?





HR SUMMER PROCESSING TIMELINE

A and H Basis Pay Plan Templates Due	Friday, June 14, 2024
FLSA Workbooks Due	Friday, June 14, 2024
A & H Basis Pay Plan Job Data Load	Beginning Week of Sunday, June 16, 2024
A & H Basis Pay Plan Letters Distributed & ePfile upload	Beginning Week of Sunday, June 16, 2024
A & H Basis Pay Plan Output Files Distributed to Institutions	Friday, June 21, 2024 (at the latest)



DATA CLEANUP

- Position Inactivation process was completed Tuesday, May 28, 2024.
- Files of inactivated positions sent out Friday, May 31, 2024 to data cleanup contacts.
- These positions can still be used by reactivating the position.



DATA CLEANUP

A row was added on the Add/Update Position Info page for each inactivated position effective January 1, 2024, using reason "Position Inactivated."

The screenshot shows the 'Add/Update Position Info' page in the University of Wisconsin System HR system. The page is divided into several sections: Position Information, Job Information, Work Location, and Salary Plan Information. The Position Information section shows Position Number 02140708, Headcount Status Open, Current Head Count 0 out of 1, Effective Date 01/01/2024, Reason 089, Position Inactivated, Action Date 05/28/2024, Position Status Approved, Status Date 05/01/2018, and Key Position checkbox. The Job Information section shows Business Unit, Job Code OT002, Ad Hoc Program Specialist, Reg/Temp Regular, Regular Shift Not Applicable, Title Ad Hoc Program Specialist, Empl Class OT1, Continuity 02B, Career Executive checkbox, Full/Part Time Full-Time, Union Code, Short Title OT002, Detailed Position Description, and Pay Basis Lump. The Work Location section shows Reg Region USA, United States, Department OFFICE OF ACADEMIC AFFAIRS, Company UWS University of Wisconsin System, Location, Reports To INT SR VP ACAD & STNDT AFRS, Supervisor Lvl, Dot-Line, and Security Clearance. The Salary Plan Information section shows Salary Admin Plan CMP, Grade 057, Step, Standard Hours 0.01, Work Period WUWS, and FTE 0.000250. The page is updated on 05/28/2024 5:38:38PM by UW_BAT_HR. The footer contains buttons for Save, Return to Search, Notify, Add, Update/Display, Include History, and Correct History.



DATA CLEANUP

- To use any of these inactivated positions, the status will need to be changed back to “Active” before the effective date of the hire using reason “Position Data Update Misc.”
- If you need to make a position data update for a position that also needs to be reactivated, you can update the status to “Active” on the same row as your update.

A screenshot of the University of Wisconsin System HR system interface, titled "Add/Update Position Info". The form is divided into several sections: "Position Information", "Job Information", "Work Location", and "Salary Plan Information".
Position Information: Includes fields for Position Number (02140708), Headcount Status (Open), Current Head Count (0 out of 1), Effective Date (06/03/2024), Status (Active), Reason (095), Position Data Update Misc., Action Date (06/03/2024), Position Status (Approved), Status Date (05/01/2016), and Key Position checkbox.
Job Information: Includes Business Unit, Job Code (OT002), Ad Hoc Program Specialist, Reg/Temp (Regular), Regular Shift (Not Applicable), Title (Ad Hoc Program Specialist), Empl Class (OT1), Continuity (02B), Career Executive checkbox, Full/Part Time (Full-Time), Union Code, Short Title (OT002), Detailed Position Description, and Pay Basis (Lump).
Work Location: Includes Reg Region (USA), Department (OFFICE OF ACADEMIC AFFAIRS), Location, Reports To (INT SR VP ACAD & STNDT AFRS), Supervisor Lvl, Company (UWS - University of Wisconsin System), Dot-Line, and Security Clearance.
Salary Plan Information: Includes Salary Admin Plan (CMP), Grade (057), Step, Standard Hours (0.01), Work Period (WUWS), and FTE (0.000250).
The form also shows a footer with "Updated on: 06/03/2024 8:22:29AM", "Updated By: 00757475", and "HANNA MULCAHY". Navigation buttons at the bottom include Save, Return to Search, Notify, Add, Update/Display, Include History, and Correct History.



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