

Change Employment Categories

Benefit Plan	Guidelines	Comments	ADM Event Date
State Group Health Insurance, Supplemental Dental (Delta Dental), Vision Insurance (VSP), State Group Life, Individual & Family Life, UW Employees, Inc. Life and Accidental Death & Dismemberment		Verify that between biweekly payroll and monthly payroll, employee only pays once for the month following the switch. System may try to take on biweekly payroll and monthly payroll depending on situation.	N/A
WRS	<ul style="list-style-type: none"> • None 	University Staff service is based on a calendar year. Faculty/Academic Staff/Limited service is based on a fiscal year. If employee is in one of their 3 highest years – could affect their retirement annuity because their high year of earnings will be allocated to two different WRS annual earnings periods. One year of creditable service: <ul style="list-style-type: none"> • University Staff – 1904 Hours • Faculty/Academic Staff/Limited – 1320 Hours 	N/A
Income Continuation Insurance	<ul style="list-style-type: none"> • Plans for University Staff and FA/AS/LI are different programs. • If previously insured, employee must submit application within 30 days to continue coverage (for both switches). • If not previously insured, switching from University Staff to FA/AS/LI, 30-day enrollment period if previously employed for one year in State service. <ul style="list-style-type: none"> ○ Current sick leave balance will affect what elimination category Employee is eligible for. • If not previously insured, switching from FA/AS/LI to University Staff, eligible to enroll if employee submits and is approved through Evidence of Insurability. <ul style="list-style-type: none"> ○ May have deferred enrollment opportunities to enroll; dependent on sick leave balances. 	If employee misses enrollment opportunity, they may be eligible through their employment category’s deferred enrollment process. If previously enrolled, coverage will not lapse if application is submitted timely.	1 st of the month on or following the switch
University Insurance Assoc. Life Insurance	<ul style="list-style-type: none"> • If switching from University Staff to FA/AS/LI, employee is automatically enrolled as of October 1st if eligible. • If switching from FA/AS/LI to University Staff, employee loses coverage at the end of the plan year (September 30th) and is eligible for conversion. <ul style="list-style-type: none"> ○ You must provide employee with conversion form. ○ Employee is eligible to convert coverage if form is submitted by November 29th following coverage end date. 	Remind employee to fill out beneficiary designation if newly enrolled.	N/A

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Flexible Spending Account	<ul style="list-style-type: none"> University Staff are paid biweekly and FA/AS/LI are paid monthly – HRS will adjust amount automatically. 	<p>When you process the MSC Event to move employee into their new benefit program it will waive them out of FSA/HSA. Create an ADM event for the 1st of the month on or following the employment switch and re-enroll them. Verify deduction is taken correctly on new payroll cycle.</p> <p>Before re-enrolling in HSA, verify that employee is enrolled in HDHP.</p>	<p>FSA Event: 1st day of the month on or following the switch</p>
Health Savings Account			
Tax-Sheltered Annuity	<ul style="list-style-type: none"> University Staff are paid biweekly and FA/AS/LI are paid monthly – have employee complete a Salary Reduction Agreement to adjust deduction to reflect change in frequency. 	<p>Verify that between biweekly payroll and monthly payroll, employee only pays once for the month following the switch. System may try to take on biweekly payroll and monthly payroll depending on situation.</p>	<p>SAV Event: 1st day of the payroll where the change becomes effective</p>
Wisconsin Deferred Compensation	<ul style="list-style-type: none"> University Staff are paid biweekly and FA/AS/LI are paid monthly – employee must change deduction to reflect change in frequency with WDC. 	<p>Verify that between biweekly payroll and monthly payroll, employee only pays once for the month following the switch. System may try to take on biweekly payroll and monthly payroll depending on situation.</p>	<p>SAV Event: 1st day of the payroll where the change becomes effective</p>
General Deductions	<ul style="list-style-type: none"> Check General Deductions to see if you need to make deduction amount changes for the shift between payroll frequencies. 	<p>Examples: Athletic fees, Partners in Giving contributions</p>	<p>1st day of the payroll where the change becomes effective</p>
Leave Balances	<p>Transfer leave balances to proper bucket (requires WiscIT). University Staff and FA/AS/LI have different leave buckets. Given the situation, some payouts may be necessary before transfer. Compensatory time is non-transferrable and must be paid out. Also, see UPS Operational Policy: BN2 or HRD Policy 16.02 (UW-Madison only) for more information on transfer of Personal Holiday hours in relation to change in employment categories.</p>		
HR Job Data	<ul style="list-style-type: none"> If employee was transferred into the new position, then no further action is necessary. If employee is going on a leave of absence from first position to take the new position on a new Empl Rcd— <ul style="list-style-type: none"> You also need to change the Benefit Primary Flag to the new Empl Rcd so benefits are taken from correct job KB 20455 		