

## Change Employment Categories

Benefit Plan	Guidelines	Comments	ADM Event Date
<b>State Group Health Insurance, Preventive Dental Insurance (Delta Dental), Supplemental Dental Insurance (Delta Dental), Vision Insurance (VSP), State Group Life Insurance, Individual &amp; Family (I&amp;F) Life Insurance, UW Employees, Inc. Life Insurance, Accidental Death &amp; Dismemberment (AD&amp;D) Insurance and Accident Insurance</b>		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
<b>University Insurance Assoc. (UIA) Life Insurance</b>	<ul style="list-style-type: none"> <li>• If switching from University Staff to FA/AS/LI, employee is automatically enrolled as of October 1<sup>st</sup> if eligible.</li> <li>• If switching from FA/AS/LI to University Staff, employee loses coverage at the end of the plan year (September 30<sup>th</sup>) and is eligible for conversion. Employee will receive a conversion notice at the end of the plan year.               <ul style="list-style-type: none"> <li>– Employee is eligible to convert coverage if form is submitted by November 29<sup>th</sup> following coverage end date.</li> </ul> </li> </ul>	Remind employee to fill out beneficiary designation if newly enrolled.	N/A
<b>Income Continuation Insurance (ICI)</b>	<ul style="list-style-type: none"> <li>• Plans for University Staff and FA/AS/LI are different programs.</li> <li>• <b>If previously insured</b>, employee must submit application within 30 days to continue coverage regardless of the type of change.</li> <li>• <b>If not previously insured, switching from University Staff to FA/AS/LI</b>, 30-day enrollment period if previously employed for one year in State service.               <ul style="list-style-type: none"> <li>– Current sick leave balance will affect the elimination category employee will want to select.</li> </ul> </li> <li>• <b>If not previously insured, switching from FA/AS/LI to University Staff</b>, eligible to enroll if employee submits and is approved through Evidence of Insurability.               <ul style="list-style-type: none"> <li>– May have deferred enrollment opportunities to enroll; dependent on sick leave balances.</li> </ul> </li> </ul>	<p>If employee misses enrollment opportunity, they may be eligible through their employment category's deferred enrollment process.</p> <p>If previously enrolled, coverage will not lapse if application is submitted timely.</p>	1 <sup>st</sup> of the month on or following the switch

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<b>Flexible Spending Account (FSA)</b>  <b>Health Savings Account (HSA)</b>	<ul style="list-style-type: none"> <li>HRS will adjust deduction amount automatically based on the employees pay frequency.</li> </ul>	<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 1<sup>st</sup> 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: 1<sup>st</sup> day of the month on or following the switch</p>
<b>Wisconsin Retirement System (WRS)</b>	<ul style="list-style-type: none"> <li>If employee is in an eligible WRS position, WRS contributions will automatically adjust and continue.</li> </ul>	<p>If employee is in one of their 3 highest years the change could affect their retirement annuity because their high year of earnings will be allocated to two different WRS annual earnings periods.</p> <ul style="list-style-type: none"> <li>University Staff service is based on a calendar year.</li> <li>Faculty/Academic Staff/Limited service is based on a fiscal year.</li> </ul> <p>One year of creditable service:</p> <ul style="list-style-type: none"> <li>University Staff – 1904 Hours</li> <li>Faculty/Academic Staff/Limited – 1320 Hours</li> </ul>	<p>N/A</p>
<b>UW Tax-Sheltered Annuity (TSA) 403(b) Program</b>	<ul style="list-style-type: none"> <li>Have employee review their deferral election and complete a Salary Reduction Agreement to adjust deduction as necessary to reflect change in frequency.</li> </ul>	<p>Review employee's paychecks to ensure deduction takes correctly. The employee's elected deferral should take from all eligible pay.</p>	<p>SAV Event: 1<sup>st</sup> day of the payroll where the change becomes effective</p>
<b>Wisconsin Deferred Compensation (WDC)</b>	<ul style="list-style-type: none"> <li>Have employee review their deferral election and contact WDC to adjust deduction as necessary to reflect change in frequency.</li> </ul>	<p>Review employee's paychecks to ensure deduction takes correctly. The employee's elected deferral should take from all eligible pay.</p>	<p>SAV Event: 1<sup>st</sup> day of the payroll where the change becomes effective</p>
<b>General Deductions</b>	<ul style="list-style-type: none"> <li>Check General Deductions to see if an adjustment needs to be made because of the change in payroll frequencies.</li> </ul>	<p>Examples: Athletic fees, Partners in Giving contributions</p>	<p>1<sup>st</sup> day of the payroll where the change becomes effective</p>

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<b>Leave Balances</b>	<p>Transfer leave balances to proper bucket (submit a request to AGs). University Staff and FA/AS/LI have different leave bucket limits. Depending on the employee’s situation, some payouts may be necessary before transfer. Review:</p> <ul style="list-style-type: none"> <li>• <a href="#">UW System Administrative Policy 1210 (formerly BN 1) Vacation, Paid Leave Banks, and Vacation Cash Payouts</a></li> <li>• <a href="#">UW System Administrative Policy 1211 (formerly BN 2) Personal Holiday Administration</a></li> <li>• <a href="#">HRD Policy 16.04 Vacation</a> (UW-Madison only)</li> <li>• <a href="#">HRD Policy 16.02 Personal Holidays</a> (UW-Madison only)</li> </ul> <p>Compensatory time is non-transferrable and must be paid out.</p>		
<b>HR Job Data</b>		<ul style="list-style-type: none"> <li>• If employee was transferred into the new position, then no further action is necessary.</li> <li>• 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"> <li>– You also need to change the Benefit Primary Flag to the new Empl Rcd so benefits are taken from correct job <a href="#">KB 27798</a></li> </ul> </li> </ul>	