LATE ENTRY IMPACTS
New BAS Mandates

October 2017
AGENDA
What is BAS?
Late Entry In HRS
  • Late Entry Impacts
  • What do you need to do???
Benefits Enrollment – Key Data Points
Terminated in Error
Lump Sum Appointments
Adjusted Continuous Service Date
Leave of Absence
Next Steps
Questions - ??????
What is BAS?

• UW partners with ETF to administer employee benefits

• ETF is implementing a new Benefits Administration System (BAS) scheduled to go live on 1/1/2018 – now a temporary delay. Will inform you when new timeline is announced

• Some current processes will need to be modified to be in compliance

• BAS will require the collection of additional, complete and timely data

• This is a mandated project from ETF

• Institutional support and compliance will help reduce negative impacts to our employees
Late Entry in HRS

Departments and Divisions must prevent late entry of HRS actions

Late entry includes:

• Hiring, rehiring, and transferring
• Job and position data changes
• Employee terminations
**Late Entry Impacts**

With the implementation of BAS, qualifying data changes entered in HRS outside of the 30 day window will be rejected by ETF and will require duplicate manual entry into HRS and ETF.

Duplicate entry causes negative impacts on employees and Departments/Divisions.

These negative impacts cause employees to lose faith and trust in the organization and the unit into which they were hired.
Late Entry in HRS
Employee Impacts

• Employee is not eligible to work and must be terminated (e.g. Criminal Background Check, I-9, Visa)
• International Employee may be in violation of their immigration status
• Employee may be paid or taxed incorrectly
• Employee is not able to set up Direct Deposit
• Deductions are not set up timely
• Employees perception of UW is tarnished
Late Entry in HRS
Employee Impacts

- Missed 30 day benefit enrollment deadlines
- Annual Base Benefit Rates (ABBR), premiums, and coverage amounts could be incorrect
- Inability to use eBenefits (Self Service)
- Retirement benefits can be impacted for the employee
- Employee receives a COBRA notice late - UW out of compliance with federal law
- Employee benefits could be terminated in HRS and with vendors
- Employees having to repay benefit premiums
Late Entry in HRS
Department/Division Impacts

- Departments or Divisions may have to amend or retract job offer due to business process not being followed
- Failed Criminal Background Checks
- Legal risk of having people working without active appointments or appointment letters
- The Department/Division is not in compliance with Federal I-9 requirements, FLSA legal requirements, Affordable Care Act (ACA), Payroll Audits, or COBRA (e.g., fines, terminations)
Late Entry in HRS
Department/Division Impacts

• The Department/Division must work with upset employees (e.g. benefits eligibility, premium rates, coverage dates and amounts, payroll issues, COBRA messages sent in error)

• Payroll errors need to be corrected (e.g. underpayments and overpayments)

• Incorrect reporting to WRS resulting in interest expense (e.g. billed back to Divisions)

• Benefit premiums may be refunded in error (e.g. potential financial hardship)

• Benefits continue in error and become an expense to UW
Late Entry in HRS
What do you need to do?

• When completing the hiring process, the best practice is to have all transactions completed and entered into the Human Resource System (HRS) prior to the start of employment

• Enter job and position data changes timely

• Review current business process to prevent negative impacts and to align with new mandates
Benefits Enrollment
Key Data Points

There are several key data points in addition to the current data being provided that need to be entered correctly prior to the employee starting work. Missing information results in delayed enrollments at Employee Trust Funds (ETF).

Key Data Points:

- Date of Birth
- Marital Status
- Adjusted Continuous Service Date
Date of Birth
Key Data Points

The Date of Birth must be entered in JEMS Hire or JEMS CHRIS HR at the time of hire. For Student Help (SH), the Date of Birth needs to be entered into the Smart HR template or via Adding a Person in HRS.

HR - WED - UW_HR_MISSING OR INCORRECT_DATE_OF_BIRTH

What do you need to do?
• Departments/Divisions should instruct employee confirm their DOB
• Department/Divisions must enter in DOB at time of hire
Marital Status and Date

Key Data Points

The Marital Status and date must be added to the employees HRS record and must reflect an employee's actual marriage date. If the field is left blank, the following impacts will occur:

• If data is not entered on the employee’s benefits enrollment documentation, it defaults to single. This impacts their ability to add dependents.

• It will stop employee data from transmitting to ETF.

• Employees can verify and update this information in their MyUW Portal.

What should you do?

Departments/Divisions should instruct employees to update their marital status in the MyUW Portal.
Terminated in Error

If an employee record is terminated in error in HRS, the late entry impacts include:

Department/Division Impacts:

- Upset and confused employees (e.g. Cobra notices sent in error, benefits terminated)
- Benefit premiums will be refunded in error

Employee Impacts:

- Employee receives a COBRA notice
- Employee benefits could be terminated in HRS and with vendors
- Employees having to repay benefit premiums
- Employee could be underpaid/not paid at all
Terminated in Error
What Should You Do?

Steps for Proactively Preventing a Job Terminating in Error (see instructional document):

1. Run the Expected Job End Date Report (EJED)
2. Determine if position allows for an extension (request OHR approval when needed)
3. If extension is allowed, update the EJED in HRS
4. If EJED is extended, notify benefits@ohr.wisc.edu to determine impact
5. Review and update Continuity
What Should You Do?
Lump Sum Appointments

- JEMS HIRE will be modified to request all new lump sum pay basis appointments to be set up as terminal and require an EJED (Refer to Job End Date Review – Best Practices document).

- Divisions will receive a list from OHR twice a year asking them to review all open lump sum appointments and end those that are no longer active.
Adjusted Continuous Service Date

Key Data Points

The Adjusted Continuous Service Date (ACSD) is now required at the beginning of an employee’s work history for University Staff, Faculty, Academic Staff, Limited Appointees, and Other appointments to meet ETF December 1, 2017 mandate.

Employee without this data will be Rejected by ETF until the field is updated.

HRS Knowledgebase – 19961
Active Employees
Leave of Absences (LOA)

Employee Trust Funds (ETF) is now mandating timely entry into HRS of all paid, unpaid, and intermittent LOAs.

LOA Types include:

- Medical LOAs (WFLMA, FMLA, Paid Leave for Bone Marrow/Human organ donation)
- Non-Medical LOAs
- Military LOAs
- Faculty Sabbatical Program

https://kb.wisc.edu/ohr/policies/
https://kb.wisc.edu/hrs/page.php?id=16904
Next Steps

• This information is being shared with Campus Leadership
• Metrics will be provided to Division and Campus Leadership
• Identify key personnel and review and/or adapt current business processes to be in compliance with the new mandates
Continuous Service and Adjusted Continuous Service Date
Continuous Service/Adjusted Continuous Service Date

As part of the BAS Project, ETF is now requiring Adjusted Continuous Service Dates (ACSDs) to be entered for WRS eligible Faculty, Academic Staff, Limited Appointees and paid OT staff.

The Adjusted Continuous Service (ACSD) field was previously only required for University Staff.
Why is the OT employment category included?

Paid OT are included because they can become WRS eligible. Multiple OT appointments (concurrent and Non-concurrent) and/or OT’s that had prior service and return within 1 year often become WRS eligible.

Many OT appointments are unpaid titles and would be excluded. If an OT hire is truly never going to be WRS eligible, then an ACSD isn’t needed.
Adjusted Continuous Service Date

Definition from UW-Madison [Continuous Service Policy]:

• Continuous Service/ACSD is all the time in a position with a State of Wisconsin agency as defined in [Wis. Admin. Code § ER 18.01(3)] or with the UW System in a position with an expectation for continued service, adjusted for any breaks in service. Continuous service at the University of Wisconsin System does not include time served in positions that are ineligible for leave per [Sick Leave Policy]. Each employee has only one Adjusted Continuous Service Date.
In simple terms:

• Continuous service/ACSD is the date on which an employee’s current period of continuous service is considered to have begun

• This date is adjusted for any breaks in service or time in service that was not eligible to earn sick leave

• Continuous service is not prorated for part-time employment
Adjusted Continuous Service Date

What does the Continuous Service Date do?

• Determines the amount of annual vacation leave University Staff members earn
• Determines eligibility of US and FAAASI employees to bank paid leave into a sabbatical or ALRA account
• Determines eligibility for and amount of supplemental sick leave credits an employee can receive at retirement for US and FAAASI
Who is eligible for sick leave:

- Faculty/Academic Staff/Limited when they are:
  - Covered by the Wisconsin Retirement System (WRS)

See [ETF's WRS Eligibility Determination](#); OR

- Expected to work 440 hours (21% for annual-basis and 28% for academic year appointments) for at least one year.
Who is eligible for sick leave:

- University Staff - Ongoing and Fixed-term Finite (Project)
  - University Staff, except those in the Temporary Employee category, are eligible to earn sick leave as soon as they are hired.
Sick Leave Eligibility

Who **is** eligible for sick leave:

- Rehired Annuitants
  - A rehired annuitant is a UW–Madison employee who is currently receiving a WRS retirement or disability annuity. Rehired WRS annuitants are eligible to earn sick leave if they meet all of the eligibility requirements in the [Sick Leave Policy](#).
  - See [Rehired Annuitant Policy](#) for more information
Who **is not** eligible for sick leave and will not have an ACSD:

- Employees-in-Training (i.e. Research Associate, Postdoc Fellow, Research Intern)
- Student Assistants (i.e. Program/Project Assistant, Teaching Assistant, Research Assistant)
- Student Help
- Temporary Employees (TE)
An ACSD has been populated in HRS for most but not all current FAASLI and OT employees.

- OHR is currently reviewing over 500 FAASLI and OT employee employment records to determine ACSDs and will be entering them into HRS. This will be complete by November 30, 2017.

- The Missing ACSD WED report will now include all required employee classifications (University Staff, FAASLI and OT).

See KB: HR – WED UW HR MISSING ADJ CONTINUOUS SVC DT
• At this time departments and divisions do not need to review and work the Missing ACSD WED report

• Beginning **December 1, 2017** they will need to begin to review their Missing ACSD WED report and take action to enter missing dates
An ACSD box has been added to JEMS Hire.

- Beginning **November 8, 2017** a date will need to be determined and entered at the division level.
- JEMS Hire will pull an ACSD from HRS if one is populated for the employee. This date will need to be confirmed or re-calculated and corrected.

- A missing ACSD will cause the file to be rejected by myETF until the value is updated.
How Continuous Service/ACSD is Calculated

Process for determining Continuous Service Date/Adjusted Continuous Service Date for the following:

• New Employee
• Rehired Employee
• Employee with prior State of WI service

• See Adjusted Continuous Service Date Job Aid for instructions.
**New Employee** in a sick leave earning position, with no prior UW System eligible service or prior State service

- Date of Hire in a sick leave earning position is the employee’s Continuous Service Date.

New Employees include:

- Employee with no prior UW System or State service
- Employee with only prior Temporary Employee (TE/LTE) service, Employee-in Training, Student Assistant or Student Hourly service
Employee hired into an Academic Staff, 1 FTE, renewable appointment with an effective date of 12/04/2017

Employee was previously employed by UW-Madison:
• Student Hourly from 09/15/2012-06/05/2015
• Temporary Employee from 07/01/2015-08/25/2017

What is their Continuous Service Date?
Answer: 12/04/2017, The Student Hourly and TE service dates are not eligible to be counted because they are not sick earning appointments.
Rehired Employee - in a sick leave earning position, prior UW System eligible service, no prior State service

- When an employee leaves eligible state service through resignation or layoff and is reemployed to eligible university or state employment within the employee’s reinstatement period the time between resignation and reinstatement is not counted towards the employee’s continuous service and the original service date must be adjusted for any such period.
• Determine if they are within their reinstatement period.

• If they are within their reinstatement period, the employee’s continuous service date will be adjusted to reflect the total duration of service for both periods of employment, adjusted for any breaks when.

• If the break in employment is longer than the specified reinstatement period, the continuous service is considered interrupted and the continuous service date shall start with the current eligible appointment. Any service earned in previous positions prior to the break or in non-leave earning positions may not be counted.
Reinstatement Periods

**Returns within 3 years**
- FAASLI terminates and returns to a sick leave eligible FAASLI appointment

**Returns within 5 years**
- FAASLI terminates and returns to a sick leave eligible University Staff appointment
- University Staff employee terminates and returns to any sick leave eligible University Staff or FAASLI appointment
- State of WI agency employee terminates classified employment and starts a sick leave eligible appointment at UW-Madison.
When a hire into a sick leave earning position has prior UW System eligible service or prior eligible State Service that is within their reinstatement period:

- Use the Continuous Service Adjustment Worksheet to calculate ACSD

1. Enter the employee’s First Start Date (start date in a sick leave earning position).
2. Enter the employee’s First Termination Date (termination date in a leave earning position).
3. Enter the First Rehire Date (rehire in a sick leave earning position). The Adjusted Date field will populate the Adjusted Continuous Service Date.
4. Repeat Steps 2-4 for each subsequent rehire and termination date in a leave earning position.
Fixed-term Finite (Project) Appointments

When to Include Fixed-term Finite (Project) Service

- Service in a Project appointment prior to 7/1/2015
  - Can only be counted if the employee held a permanent classified or an unclassified appointment other than a limited term employee (LTE) appointment within 5 years prior to the project appointment

Per:
ER 18.02
https://docs.legis.wisconsin.gov/code/admin_code/er/18/02
ER 18.05
https://docs.legis.wisconsin.gov/code/admin_code/er/18/05
When to Include Fixed-term Finite (Project) Service

- Service in a Fixed-term Finite (Project) appointment on or after 7/1/2015
  - If appointment was with UW System, it is counted on its own and doesn’t require previous service
  - If appointment was with a State Agency, it can only be counted if the employee held a permanent classified or an unclassified appointment other than a limited term employee (LTE) appointment within 5 years prior to the project appointment. Per ER 18.02 and 18.05
Employee hired into an Academic Staff, 1 FTE, renewable appointment with an effective date of 11/05/2017

Employee was previously employed by UW-Madison in a CP appointment from 09/01/2005 until 05/05/2013

Is their CP service from 09/01/2005 to 05/05/2013 counted?
ACSD Example #2

Answer:

Yes: They were a CP employee and returned to a sick leave eligible FAASLI appointment within the 5 year reinstatement period.
Employee hired into a Faculty, A-Basis appointment with effective date of 11/05/2017

Employee was previously employed by UW-Milwaukee in a Academic Staff appointment from 08/25/1998 until 06/01/2008

Is their service from 08/25/1998 to 06/01/2008 counted?
Answer:

No: The reinstatement period for a FAASLI appointment to another FAASLI appointment is 3 years. The original AS appointment ended 06/01/2008 and the new FA appointment didn’t begin until 11/05/2017 which is outside of the 3 year range. The ACSD would be 11/05/2017.
Termination from UW-Madison, UW System or a State of Wisconsin Agency due to misconduct or delinquency:

• Termination due to misconduct or delinquency may result in the loss of all continuous service. Any return to service following termination for misconduct or delinquency is deemed to not be a qualifying reemployment under this provision, even though the return is within the three- or five-year period.

  • The Workforce Relations Office should be consulted in these cases.
Adjusted Continuous Service Date for an Employee with Prior State of WI Service

- **Employee with Prior State of WI Service** follow the same steps as a rehire except:
  - The previous start dates and termination dates can be obtained by:
    - Reviewing the employee’s personnel file (Personnel Transfer Record)
    - Contact the State Agency with questions
    - Departments should consult with their Division and Divisions can contact Workforce Relations, who will review the ETF ONE system (informational only to verify dates found in the employee’s Personnel File or if the Personnel Transfer Record cannot be found)
ACSD Considerations

• Service with local municipalities (i.e. local government, local school district) is **not** eligible for Continuous Service.

• Continuous Service/Adjusted Continuous Service is different than Wisconsin Retirement System (WRS) Creditable Service.
WRS Creditable Service

- WRS Creditable Service is the years of service for which a WRS participant has received credit under the WRS and includes all service for which contributions have been made, purchased service and any retirement service credit granted by the employer prior to the date the employer joined the WRS.
Continuous Service is Uninterrupted

• The continuous service of an employee is considered uninterrupted and shall not be adjusted for the break if the employee:
  – Was on an approved leave of absence as provided under Family-Related Leave Policy.
  – Was absent on military leave.
  – Was absent due to injury or illness arising from state employment.
Continuous Service is Uninterrupted

– Was on temporary layoff not to exceed 20 working days as outlined in Layoff of University Staff

– Was employed in a leave-eligible position at another UW System institution or State of Wisconsin agency.

*A termination date will not be entered into HRS for these types of leaves
C-Basis (Academic Year) Employees

- If the position has the expectation of continued employment, the summer months while an employee is on short work break does not reduce the Continuous Service Date and the short work break will not be considered a break in service.

*A termination date will not be entered into HRS for these short work breaks*
ACSD Determination Assistance

- Departments should contact their Division HR with questions on determining ACSD.

- Divisions can contact the Workforce Relations Team mailbox at wr@ohr.wisc.edu with questions on determining ACSD or to request an ACSD be reviewed.
Resources for more information:

- [UW-Madison Continuous Service Policy](#)
- [Continuous Service Date Calculator](#)
- [UPS Operational Policy BN12: Continuous Service](#)
Questions?
Leave of Absence
New Leave of Absence Data Requirements

• Employee Trust Funds (ETF) is mandating reporting of all paid, unpaid and intermittent Leaves of Absence

• Reporting will occur through entry into HRS of a begin date, stop date, and the last date an employee is entitled to receive pay (when applicable)
UW System’s Definition of Leave of Absence

“An absence from employment with the approval of the employer with or without loss of pay in accordance with the appropriate statutory provision or rule. A leave of absence may be paid or unpaid, and may be for medical or other reasons.”
What is Changing?

• Current State: Paid leave entry into HRS is a best practice

• Future State: All Leave of Absence entry into HRS **Job Data** is **mandatory**. Paid/Unpaid leave entry through only timesheet or absence management does not meet this new requirement.
Change Management

Colleges, Schools and Divisions will need to determine:

• Who is responsible for entering leaves of absence, changes to leaves of absence and returns from leave into HRS?

• How is leave of absence information communicated to those responsible for entry?
Leave Types

• Medical Leaves:
  • Reason for leave covered by Wisconsin Family and Medical Leave Act (WFMLA)
  • Reason for leave covered by Federal Family and Medical Leave Act (FMLA)
  • Paid Leave of Absence for Bone Marrow & Human Organ Donation
• Non-Medical Leaves of Absence
• Military Leave
• Faculty Sabbatical Program
Medical Leaves

• WFMLA and FMLA
  – Unpaid leaves of absence but employees are permitted to choose to use earned paid leave in any amount up to their FTE while on approved leave.
  – Leaves may be continuous, reduced schedule or intermittent.
Medical Leaves

• Paid Leave of Absence for Bone Marrow & Human Organ Donation
  – Applies to Faculty, Academic Staff, Limited and University Staff appointments who earn sick leave
  – Prior to donation, employee must provide written verification to the Divisional Disability Representative (DDR)
    • Up to 5 working days of paid leave for Bone Marrow Donation
    • Up to 30 working days of paid leave for Human Organ Donation

Bone Marrow and Human Organ Donation Policy
Non-Medical Leaves of Absence

Faculty, Academic Staff, Limited Appointees and University Staff may submit request for full or part-time LOA without pay, for non-medical reasons. Leaves require appropriate prior approval.

Reasons for leave include, but are not limited to:

• Engage in public service (elected or appointed official for local/state/federal government)
• Take maternity, paternity or adoption beyond FMLA/WFMLA
• Engage in entrepreneurial activities
Military Leave

Employees ordered or inducted into military service may be placed on unpaid military leave of absence or upon approval, employee may be placed on paid leave of absence or partial leave of absence and use accrued paid leave (except sick leave) to remain on the payroll during all or part of the leave

• Military leaves can be complicated and a ticket should be created to work directly with the Service Center
Faculty Sabbatical Leave Program

Professional leave program that enables faculty members to engage in intensive study in order to become more effective teachers and scholars and to enhance their services to the University.

Two types:

1- Leave for Academic Year; financial support up to 65% of full compensation

2- Leave for 1 semester; financial support up to the maximum of full compensation for the semester

Be sure to return the faculty from leave.
Objectives

• Consistent, uniform, timely entry of Leave of Absence information across the University of Wisconsin System
• Data integrity; better compliance with FMLA and WFMLA regulations
• Reduction in over and under payments
• Better reporting capability
• Compliance with Department of Employee Trust Funds data needs
## Leave of Absence

### Unpaid Leave of Absence (LOA)

<table>
<thead>
<tr>
<th>Action</th>
<th>Reason Codes</th>
<th>Steps to Entry</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leave of Absence</td>
<td>Adoption, Educational, Elder-Dependent Care, H. Hughes Funding, Long-Union Act, Maternity, Medical, Military, Other Work, Paternity, Personal Reasons, Professional, Short-Union Act, Suspension Without Pay, Unclassified Job, VA Funding</td>
<td>Job Data:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1. On Job Data click the + button to add a new row</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2. Enter Effective Date of Leave of Absence</td>
</tr>
<tr>
<td></td>
<td></td>
<td>3. Select Action = Leave of Absence</td>
</tr>
<tr>
<td></td>
<td></td>
<td>4. Select appropriate Action Reason</td>
</tr>
<tr>
<td></td>
<td></td>
<td>5. Enter an Expected Return Date, if available</td>
</tr>
<tr>
<td></td>
<td></td>
<td>6. Click the Save button</td>
</tr>
</tbody>
</table>

### Unpaid LOA Details
- Leave of absence without pay
- The employee’s payroll status changes to Leave of Absence
- This will remove the employee from all payroll, absence and benefits processing while on an unpaid LOA
- Employee will no longer be able to enter paid leave
Unpaid Leave of Absence
# Paid Leave of Absence

## Paid Full Time LOA

<table>
<thead>
<tr>
<th>Action</th>
<th>Reason Codes</th>
<th>Steps to Entry</th>
</tr>
</thead>
</table>
| **Paid Leave of Absence** | Administrative Adoption Educational Elder-Dependent Care FMLA-Continuous FMLA-Intermittent Faculty Sabbatical H. Hughes Funding Long-Union Act Maternity Medical Military Other Work Partial LOA-Faculty Sabbatical Paternity Personal Reasons Professional Worker’s Comp | **Job Data:**  
1. On Job Data click the + button to add a new row  
2. Enter Effective Date of Leave of Absence  
3. Select Action = Paid Leave of Absence  
4. Select appropriate Action Reason  
5. Enter an Expected Return Date, if available  
6. Click the Save button |

### Paid Full Time LOA Details
- Leave of absence with full pay using paid leave or in the case of administrative leave, on leave of absence without loss of pay
- The employee’s payroll status changes to Leave With Pay
- Payroll and benefits process as normal
- Employee needs to report leave through their normal reporting channels
Worker’s Compensation- When an employee elects to use paid leave or LWOP

- Job Data—Action is a “Paid LOA” and Reason is “Worker’s Comp”
  - Action and reason codes remains the same regardless if employee is using paid leave or LWOP
- This is required in order for employee to receive credit for Wisconsin Retirement System (WRS) service
- Paid leave or LWOP is entered in HRS via Absence Management
Partial Leave of Absence

<table>
<thead>
<tr>
<th>Entered in HRS by reducing the employee’s position FTE</th>
<th>Reason Codes</th>
<th>Steps to Entry</th>
</tr>
</thead>
</table>
| *Entered in Position Information so no Action Reason needed | Partial LOA-Adoption  
Part LOA-Educational  
Part LOA-Maternity  
Part LOA-Medical  
Part LOA-Other Work  
Part LOA-Paternity  
Part LOA-Personal Reasons  
Part LOA-Professional  
Part LOA-Seasonal Work  
Part LOA-Unclass Job  
Part LOA-VA Funding  
Part LOA-Elder-Depend Care | Add/Update Position Info:  
1. Click + button to add a row  
2. Enter Effective Date  
3. Enter a Reason Code (ex. 043 – Partial LOA – Medical)  
4. Change the Standard Hours to the number of hours the employee is approved to work. For example, the full time employee is working half time (20 hours), this will reduce the FTE to 0.50.  
5. Click the Save button | |
Partial Leave of Absence

Position Information

<table>
<thead>
<tr>
<th>Position Number</th>
<th>00408167</th>
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<tbody>
<tr>
<td>Headcount Status</td>
<td>Filled</td>
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<tr>
<td>*Effective Date</td>
<td>06/28/2017</td>
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<tr>
<td>*Reason</td>
<td>045: Partial LOA - Maternity</td>
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<tr>
<td>*Position Status</td>
<td>Approved</td>
</tr>
<tr>
<td>Current Head Count</td>
<td>1 out of 1</td>
</tr>
<tr>
<td>*Status</td>
<td>Active</td>
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<tr>
<td>Action Date</td>
<td>06/18/2017</td>
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Job Information

<table>
<thead>
<tr>
<th>Business Unit</th>
<th>UWOSUH</th>
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</thead>
<tbody>
<tr>
<td>Supervisor LVL</td>
<td>047: Partial LOA - Unclass Job</td>
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</tbody>
</table>

Salary Plan Information

<table>
<thead>
<tr>
<th>Salary Admin Plan</th>
<th>FC3C</th>
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<tbody>
<tr>
<td>Standard Hours</td>
<td>80</td>
</tr>
<tr>
<td>Grade</td>
<td>S11</td>
</tr>
<tr>
<td>Step</td>
<td>20</td>
</tr>
<tr>
<td>Work Period</td>
<td>WUWS</td>
</tr>
</tbody>
</table>

FTE: 1.000000

Updated on: 06/18/2017 11:22:27AM
Updated By: 00000000
SHERYL PETERSON
# Intermittent FMLA LOA

## Intermittent FMLA LOA

<table>
<thead>
<tr>
<th>Action</th>
<th>Reason Codes</th>
<th>Steps to Entry</th>
</tr>
</thead>
<tbody>
<tr>
<td>Paid Leave of Absence</td>
<td>FMLA-Intermittent</td>
<td><strong>Job Data:</strong></td>
</tr>
<tr>
<td><strong>Paid LOA Details</strong></td>
<td></td>
<td>1. On Job Data click the + button to add a new row</td>
</tr>
<tr>
<td>Leave of absence in non-continuous increments</td>
<td></td>
<td>2. Enter Effective Date that the intermittent leave of absence begins</td>
</tr>
<tr>
<td>The employee’s payroll status changes to Leave with Pay</td>
<td></td>
<td>3. Select Action = Paid Leave of Absence</td>
</tr>
<tr>
<td>Payroll and benefits process as normal if there are enough earnings to cover the benefit premiums</td>
<td></td>
<td>4. Select Reason = FMLA Intermittent</td>
</tr>
<tr>
<td>Employee needs to report leave (LWOP or earned leave)</td>
<td></td>
<td>5. Enter an Expected Return Date, if available</td>
</tr>
<tr>
<td>Intermittent leave for all UW-Madison employees will be tracked in 15-minute increments</td>
<td></td>
<td>6. Click the Save button</td>
</tr>
</tbody>
</table>
## Return from Partial LOA

<table>
<thead>
<tr>
<th>Action</th>
<th>Reason</th>
<th>Steps to Entry</th>
</tr>
</thead>
<tbody>
<tr>
<td>*Entered in Position Information so no Action Reason needed</td>
<td>Return from Partial LOA</td>
<td>Add/Update Position Info:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1. Click + button to add another row</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2. Enter Effective Date</td>
</tr>
<tr>
<td></td>
<td></td>
<td>3. Enter a Reason Code (ex. 087 – Return from Partial LOA)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>4. Return Standard Hours to employee’s previous standard hours, this will return the their previous FTE</td>
</tr>
<tr>
<td></td>
<td></td>
<td>5. Click the Save button</td>
</tr>
<tr>
<td></td>
<td></td>
<td>6. Click OK button</td>
</tr>
</tbody>
</table>
Return from Partial Leave of Absence

<table>
<thead>
<tr>
<th>Position Information</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Position Number</td>
<td>004098167</td>
</tr>
<tr>
<td>Headcount Status</td>
<td>Filled</td>
</tr>
<tr>
<td>*Effective Date</td>
<td>07/31/2017</td>
</tr>
<tr>
<td>*Reason</td>
<td>087</td>
</tr>
<tr>
<td>*Position Status</td>
<td>Approved</td>
</tr>
<tr>
<td>Current Head Count</td>
<td>1 out of 1</td>
</tr>
<tr>
<td>Status</td>
<td>Active</td>
</tr>
<tr>
<td>Action Date</td>
<td>06/18/2017</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Job Information</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Unit</td>
<td>UW Oshkosh</td>
</tr>
<tr>
<td>Career Executive</td>
<td></td>
</tr>
<tr>
<td>Supervisor Lvl</td>
<td></td>
</tr>
<tr>
<td>Security Clearance</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Salary Plan Information</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salary Admin Plan</td>
<td>FG3C</td>
</tr>
<tr>
<td>Grade</td>
<td>S11</td>
</tr>
<tr>
<td>Step</td>
<td></td>
</tr>
<tr>
<td>Standard Hours</td>
<td>40</td>
</tr>
<tr>
<td>Work Period</td>
<td>WUWS</td>
</tr>
<tr>
<td>FTE</td>
<td>1.000000</td>
</tr>
</tbody>
</table>

Updated on 06/18/2017 11:22:27AM Updated By 00000000 SHERYL PETERSON
<table>
<thead>
<tr>
<th>Action</th>
<th>Reason</th>
<th>Steps to Entry</th>
</tr>
</thead>
<tbody>
<tr>
<td>Return from Leave</td>
<td>Return from Leave</td>
<td>Job Data:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1. On Job Data click the + button to add a new row</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2. Enter Effective Date of the employee’s return to work</td>
</tr>
<tr>
<td></td>
<td></td>
<td>3. Select Action = Return from Leave</td>
</tr>
<tr>
<td></td>
<td></td>
<td>4. Select Reason = Return from Leave</td>
</tr>
<tr>
<td></td>
<td></td>
<td>5. Click the Save button</td>
</tr>
</tbody>
</table>
Return from Leave of Absence

1. Highlight the Action field and select "Return from Leave".
2. Enter the Effective Date as 07/31/2017.
3. Verify the Employee ID and Empl ID are correct.
4. Confirm the Payroll Status is active.
5. Click on "Return to Search" or "Notify" as needed.
Employee Impact

• **Accurate pay check**
  - Unpaid LOA needs to be entered timely when applicable to remove the employee from payroll and ensure the employee is not being paid for time they are absent from work

• **Accurate leave usage**
  - Employees understand their options or requirements to use paid leave and are able to designate it accordingly

• **Benefit Coverage and Billing**
  - Entered LOAs assist in the early setup of Benefit Billing to ensure insurance coverage does not lapse due to non-payment (include link of form)
• **The Income Continuation**
  - ICI program relies on entered LOAs to set the annual base benefit rate (ABBR) during the annual review as well as during Deferred Enrollment. Without knowing an employee had been on an unpaid LOA, the person's ABBR would be incorrectly reduced based on prior year WRS earnings.
Resources for more information:

- **HR - LOA - Leave of Absence (Unpaid, Paid, Partial, Intermittent)**
Questions?
Following Slides on Benefit Impacts
Provided for Your Information
Employee Impact

• When you become aware an employee will be taking a leave of absence the division or department is **required** to complete the **Leave of Absence Benefits Intentions Form** and **must** submit it as soon as possible.
  – This form is not linked to HRS–Information will be entered into HRS at appropriate time based on the information you provide and the payroll process dates.

![Leave of Absence Benefits Intentions Form](image)
Employee Impact

• When the “Leave of Absence Benefits Intentions Form” is not submitted timely then benefit billing will be the main source of collecting premiums.
  – Bills are mailed between the 14th - 24th of each month (e.g., May 24th)
  – Payment is due the 10th of the following month (e.g., June 10th)
  – Payment received will be for the following month’s coverage (e.g., July)
Department or division is required to submit an amended form to MBS when you become aware of any of the following changes to the employees original LOA:

- Leave of absence extended
- Lapsing of benefits, per the employee’s request
- When you are notified of the a Worker’s Compensation has been approved or denied
- When there is an approved worker’s compensation claim, the employee is eligible for the employer share for SGH for the duration of the approved claim
Employee Impact

- **Future dated LOA**
  - Form can be submitted as soon as you are aware of a future dated LOA (e.g., LOA to begin 8/21/2017)
    - The employee will have an option to elect pre-pays for future premium months
    - Prevents missed premiums which will result in double deduction

- **Just in time LOA**
  - Submit form as soon as you are aware of the leave (e.g., 05/25/2017)
    - Due to the timing of when the form is being submitted, the employee may not have an option to elect prepays
    - If the employee is not eligible for pre-pays then benefit billing, which is post taxed, will be the only option available
    - Due to the timing of when the form is received, the employee may be billed for multiple pay periods
Employee Impact

• **Late LOA**- When Madison Benefit Service (MBS) receives the “Leave of Absence Benefits Intention Form” after the employee has already started their LOA.
  – Employee will be enrolled in benefit billing
    • Employee may have missed multiple deductions and will have multiple premiums due
    • Entire unpaid balance will be due or benefits will be lapsed due to nonpayment
      – Payment plan is often not an option
    • If the form is received and the employee is expected to be back on payroll the very next payroll calc, then benefit billing is NOT an option and employee will have multiple premiums deducted from future earnings.
Impact on Benefits

- Benefits impact

<table>
<thead>
<tr>
<th>Benefit Options while on Unpaid Leave of Absence (LOA)</th>
</tr>
</thead>
<tbody>
<tr>
<td>This information will assist you in making decisions about your benefits while on an unpaid LOA. Please contact your department or UW-Madison Benefits Services with any questions you have regarding your benefits or payment for benefits during your leave. Benefits will lapse if premiums are not paid.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Benefit Plan</th>
<th>Maintain</th>
<th>Change/Lapse</th>
<th>Re-Enrollment</th>
</tr>
</thead>
<tbody>
<tr>
<td>State Group Health (SGH)</td>
<td>- Employer contribution will continue for the paid through month, and three additional months. Example: LOA starts 04/15; employee has paid for May coverage with April earnings. Employer contribution will continue for June, July, and August coverage months. - Coverage can continue up to 36 months provided premiums are paid.</td>
<td>- Continue coverage but change from family to single coverage at the beginning of the LOA or when you become responsible for the full premium. - Maintain coverage for the 3 months in which you receive employer contribution; and lapse coverage when you become responsible for the full premium. - Lapse at any time during the leave for the duration of the leave. Written notification (not an application) is required to lapse coverage **If you allow family coverage to lapse while on LOA, and you pass away before reinstating coverage, surviving dependents will not have access to your sick leave credits to pay for health insurance.</td>
<td>- You may re-enroll in the insurance carried prior to the leave upon your return to work. An application must be received within 30 days of your return to work. - Employer contribution towards premiums will begin once your LOA is deemed ended ○ See attached document for examples</td>
</tr>
<tr>
<td>Health Saving Account (HSA)</td>
<td>○ Pre-tax contributions made via payroll will end on the last paycheck and resume when you return to work</td>
<td>○ If you allow your HDHP coverage to lapse you may not make contributions to HSA again until HDHP coverage is reinstated. ○ $3.00 monthly administration fee will be applied if HDHP coverage lapses</td>
<td>○ You can continue to withdraw HSA funds for qualified expenses as long as there are sufficient funds available. ○ If your account balance is $0.00, and a deposit has not been made in 90 days, the account will be closed.</td>
</tr>
<tr>
<td>If enrolled in the SGH High Deductible Health Plan (HDHP)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

UNIVERSITY OF WISCONSIN–MADISON
Impact on Benefits

This is a list of benefits that may be impacted due to unpaid LOA:

- State Group Health
  - 40.02 (40)
- Income continuation
  - 40.02 (40)
- Life Insurance
  - State Group Life
  - Individual and Family Life
  - UW Employees Inc. Life
  - University Insurance Association Life
  - Accidental Death and Dismemberment
- Supplemental Plans
  - VSP & Dental
- Employee Reimbursement Accounts
  - Flexible Spending Account (FSA)
  - Limited Purpose FSA
  - Health Savings Account
- Worker’s Compensation
- Tax Shelter Annuity (TSA)
- Wisconsin Deferred Compensation (WDC)
Questions ??