August 2, 2023

UFHR Forum

UF Human Resources

903 W University Ave. Gainesville, FL 32601-5117
HR.UFL.EDU | (352) 392-2477

Agenda

Fidelity

- JT Carpenter | Gene Varela

Training & Organizational Dev

- Shannon Powell

Employment Operations & Records

- Johannes Traster

Important Dates

Fidelity Investments

JT Carpenter | Gene Varela

University of Florida Retirement Plans & Educational Opportunities

1:1 Virtual Meetings available to help employees

- Confidential consultations with a Workplace Financial Consultant who understands your plan
- One-on-one or with the participant's planning partner
- Convenient to meet from home, office, or University of Florida locations
- Screen-sharing helps participants understand where to find information and take action

Fidelity INVESTMENTS

Helping participants get answers when and how they need it.

Real questions. Real-time answers.

New Hires

Department Meetings

Open Enrollment

Because participants:

- are busy and sometimes just need a quick answer
- want to talk with someone who knows their plan
- need help now so they can make an informed decision

Virtual Planning and Advice

Confidential one-on-one consultations to review financial goals, provide investment advice and help employees plan for retirement.

Virtual Workshops

1-hour presentations led by a Fidelity Educational Consultant.

Provides in-depth learning on a variety of topics that can impact employee financial well-being.

Virtual Group Q&A

Scheduled group Q&A events led by Fidelity representatives.

Provides a flexible forum for employee questions on high interest financial and benefit topics.

Ask Fidelity Q&A

Helping employees get the answers they need to make informed financial decisions – **when they need it most.**

Enrolling and investing

Reviewing plan options

Understanding plan changes

Transitioning to Retirement

Fidelity INVESTMENTS

Employees need

a convenient way to get quick answers to their questions

we provide an easy way to get help

What

Hosted by Fidelity:
- Short presentation followed by Q&A
- Questions submitted before/during event
- Demos of NetBenefits

How

Event promotion:
- Email invitation
- NetBenefits messaging
- Client promotions
- Newsletter teasers

Ask Fidelity

Helping employees get the answers they need to make informed financial decisions – when they need it most.

ONSITE LIVE | ON DEMAND | VIRTUAL LIVE

REVIEW PLAN OPTIONS

These sessions cover topics such as workplace savings plans and options, retirement plan changes, and online navigation.

Making the Most of Your Non-Qualified Retirement Plan

Learn how a non-qualified retirement plan can help you save for your retirement.

Get to Know Your Retirement Plan and Fidelity Workplace Financial Consultant[1]

You don't have to know all the answers – Fidelity is here to help. Learn how your retirement plan works and how we can help you, so you can make the most of this important benefit.

Put the Power of NetBenefits to Work for You

Did you know that there's more to do in NetBenefits than checking your balance? Come on a tour and discover the powerful resources that can help you plan, track, and save for retirement.

What is a Roth In-Plan Conversion?

Your retirement plan offers many ways to save for the future. Learn more about your options, including how to convert after-tax dollars to a Roth using an in-plan conversion

A Retirement Plan vs. an Individual Retirement Account

When it comes to saving for retirement, there are two basic options that are most common, a retirement plan and an individual retirement account. Explore the features of both to help you make informed decisions.

Upcoming Retirement Plan Changes

Your retirement plan is changing. Fidelity is here to help you navigate the changes so you may understand your available options.

Discover the Potential of Your Health Savings Account

Understand the benefits of saving and investing money in a Health Savings Account to help you prepare for medical expenses now and in retirement.

The Benefits of Working with a Financial Professional

Whether you're just starting out or transitioning into retirement, a financial professional can help you plan for your short and long-term goals. Learn more about what to expect when you work with Fidelity.

Saving Through Roth Contributions in My Retirement Plan

Understand the options for saving pre-tax or after-tax (Roth) money in your workplace retirement savings plan so you can decide what's right for your situation.

ENROLL AND INVEST

These sessions cover topics such as foundational financial topics including how to save, enroll, and invest.

The Tax (and Personal) Benefits of Charitable Giving

Many people contribute cash to their favorite charities, but there are additional options to consider. Learn more about other tax-effective ways to give.

Quarterly Market Update

Listen to Fidelity financial experts as they share insights on current market conditions and their impact on today's business cycles.

How Consolidating Accounts Could Help You Save Time and Money

Learn how consolidating your retirement accounts could help simplify your financial life.

Saving and Investing Beyond Your Retirement Plan

Saving for retirement, but need help with your short-term financial goals? Learn the basics of investing, and the different types of accounts, so you can optimize your savings to help you reach your goals.

Making Your Money Work as Hard as You Do

See what options are available and what you need to know to get started with investing.

Getting the Most From Personalized Planning & Advice[2]

Learn about the Fidelity Personalized Planning & Advice service and how it may assist you in meeting your retirement goals.

Understanding Your Options When Saving for College

Your child's college costs may be one of the largest expenditures you ever make. Gain a basic understanding of how to start saving now and the different saving and investing options.

Understanding Your Retirement Plan and All It Has to Offer

Your employer's retirement plan is an essential part of your future. Learn how it works, from contributions to investment options, so you can make the most of this important benefit.

Get to Know Your New Employer's Retirement Plan

Learn more about your new employer's retirement plan and the important next steps to take advantage of your benefits.

Resetting Your Financial Foundation

Whether it's prioritizing expenses and debt or saving for the future, it's important to review your saving and spending to get clarity on where your money is going.

How to Make the Most of Your Retirement Savings

How much is "enough" for retirement? Learn strategies that can help you save more today and tips for preserving and growing your savings in retirement.

[1]Episodes feature a live channel call-to-action
[2]Only available for plans that offer FPPA.

Ask Fidelity

Helping employees get the answers they need to make informed financial decisions – when they need it most.

ONSITE LIVE | ON DEMAND | VIRTUAL LIVE

TRANSITION TO RETIREMENT

These sessions cover topics for pre-retirees, including important considerations, Social Security, and income planning.

How to Plan for the Income You'll Need in Retirement

How do your financial resources turn into income in retirement? It starts with a plan. Learn how to create a retirement income plan and explore the risks that can impact it.

Understanding the Basics of Social Security

Social Security may be an important income source for retirement. Learn about key Social Security claiming ages and how your benefit is calculated, so you can better understand the choices.

The Role Roth IRAs Can Play in Retirement

There is power behind the Roth IRA. Learn more about how you can take advantage of this savings vehicle for your retirement portfolio.

Creating the Retirement You Want

Whether you're planning as a couple or on your own, it's important for women to plan for higher retirement expenses (especially health care costs) and be strategic about when to claim Social Security.

Top Things to Do Before You Retire

Wish you had a to do list to help you prepare for retirement? Learn how to get your financial house in order and other important considerations that can impact your decisions.

Planning for Health Care Costs and Coverage in Retirement

Health care costs in retirement can affect your savings and lifestyle. Explore how to prepare for the reality of health care costs in retirement.

FINANCIAL WELLNESS

These sessions cover financial wellness and potential ways to feel good about your financial plans.

What is Financial Wellness and Why Is It Important?

Being well prepared to handle any financial crisis, that's financial wellness. Learn how to prioritize your needs and wants, so you can pay today's bills while saving for your future goals.

Setting Goals and Habits That Stick

You can start by identifying or revisiting what you want your money to achieve and setting up good habits to create lasting change.

Understanding Your Debt So You Can Take Control

Would you like to get a handle on your debt, once and for all? Discover real strategies to help you prioritize what to payoff first and tips for managing your spending.

Demystifying Your Credit Score

Lenders use credit scores to decide whether to offer credit, and under what terms. Discover what goes into your credit score and how it's calculated, to understand the impact it has on your borrowing.

Navigating Divorce

Navigating divorce can affect the entire family. Having the right plan, support system, and reminders for self-care in place can make a huge difference.

Buying a Home

Home ownership can be rewarding but there are several factors to consider, some which may not be obvious to the first time (or even seasoned!) buyer.

Creating a Budget You'll Actually Use

Planning out your spending, and living within a budget, is all about freedom. Learn how to create a budget you'll use, so you're prepared for the unexpected, and able to pursue what's important to you.

Why a Savings Plan Should Be Important to You

We're all trying to save for something—like an emergency, car, home, or retirement. Learn how to create a plan so you can optimize your saving and investing to help you reach them.

Financial Considerations for Women

Learn about what's different for women, why it's important, and how to make informed decisions, so you can put your money to work to help you reach your goals

Estate Plans Can Help Protect What Matters Most*

If you haven't created an estate plan yet, you'll be surprised how many topics it covers. Learn five steps to consider when preparing to meet with your estate planning professional.

Caring for an Aging Loved One

Aging is a part of life. We will discuss how to prepare a plan with and for your loved one, navigate common concerns, and prioritize your own self-care in the process.

Life Events: College Planning - Navigating the Road to Admissions

College planning, for parents and child, is about more than saving money. We can help on key steps from saving, preparing, applying and choosing.

Fidelity INVESTMENTS

Training & Organizational Development

Shannon Powell

UF Human Resources

CxUF

CONNECTED BY UF

ANNOUNCING CxUF 2023

“Investing in Our Tomorrow”

At UF, for UF, by UF on November 15 & 16, 2023

CxUF Registration opens August 31

Closes on September 29, 2023

Don’t miss a moment of the action!

Join the CxUF mailing list to receive an early preview of conference sessions and be the first in line to register. Sign up today!

https://learn-and-grow.hr.ufl.edu/cxuf/

GBAS Fall Workshop

Grateful Gators: Feedback with an Attitude of Gratitude

Tuesday, September 12th at 9:00am

Virtual in Zoom

The power of gratitude is backed by compelling scientific data that demonstrates its effectiveness as a remedy for stress and anxiety, motivator of peak performance, and builder of meaningful relationships. Learn the science behind giving and receiving feedback, and how to integrate it into your daily practice.

Registration coming soon, stay tuned to the GBAS Listserv!

Fall Training Calendar

New classes available starting

August 7, 2023

UF Human Resources

Employment Operations & Records

Johannes Traster

UF Human Resources

Courtesy Faculty Updates

Researcher & Research Support Screening (RISC)

- RISC Assessments are required for general courtesy faculty appointments
  - 'General courtesy faculty' include those who do not have any other paid affiliation with UF
  - Joint and affiliate courtesy faculty who hold an active 'paid' appointment are not included in screening process
- Reappointments (after 5yrs in appointment) are not included in the screening process
  - Even if applicant did not previously go through the screening process
- Specific templates now available for general courtesy and joint/affiliate courtesy
  - General Courtesy Offer Letter Template: https://hr.ufl.edu/wp-content/uploads/2023/01/letter_of_offer_CTSY-FAC_template_1-27-23.docx
  - Joint/Affiliate Offer Letter Template: https://hr.ufl.edu/wp-content/uploads/2023/07/letter_of_offer_CTSY-FAC_template_7-27-23.docx

Courtesy Faculty Updates

Researcher & Research Support Screening (RISC)

- ❑ Talent Acquisition & Onboarding's website & Employment Operations & Records' webpages are now updated with screening guidelines.
  - ❑ TAO: https://hr.ufl.edu/manager-resources/recruitment-staffing/researcher-screening/
  - ❑ EOR: https://hr.ufl.edu/manager-resources/employment-hub/non-employee-appointments/
  - ❑ Courtesy Faculty FAQs: https://hr.ufl.edu/wp-content/uploads/2023/01/Courtesy-Faculty-FAQs.pdf
- ❑ Reminder: New courtesy faculty template with RISC attestation box for general courtesy faculty appointments must be in use now.

New I-9 Form & Procedures

Launch Date & Changes

- ❑ New Form I-9 launched August 1, 2023, and becomes mandatory on November 1, 2023
  - ❑ Equifax is currently in the process of updating GatorStart packets and modifying I-9 Management
- ❑ Reduced Sections 1 and 2 to a single-sided sheet
- ❑ Moved the Section 1 Preparer/Translator Certification area to a separate, standalone supplement (Supplement A) that employers can provide to employees when necessary.
- ❑ Moved the Section 3 Reverification and Rehire area to a separate, standalone supplement (Supplement B) that employers can print if reverification is required.
- ❑ Removed use of “alien authorized to work” in Section 1 and replaced it with “noncitizen authorized to work” as well as clarified the difference between “noncitizen national” and “noncitizen authorized to work.”

New I-9 Form & Procedures

Changes Cont.

- ❑ Form can be filled out on tablets and mobile devices.
- ❑ Removed certain features to ensure the form can be downloaded easily. This also removes the requirement to enter N/A in certain fields.
- ❑ Updated the notice at the top of the Form I–9 that explains how to avoid discrimination in the Form I–9 process.
- ❑ Revised the Lists of Acceptable Documents page to include some acceptable receipts as well as guidance and links to information on automatic extensions of employment authorization documentation.
- ❑ Added a box that eligible employers must check if the employee's Form I–9 documentation was examined under a DHS-authorized alternative procedure rather than via physical examination.

New I-9 Form

Employment Eligibility Verification
Department of Homeland Security
U.S. Citizenship and Immigration Services

USCIS
Form I-9
OMB No.1615-0047
Expires 07/31/2026

START HERE: Employers must ensure the form instructions are available to employees when completing this form. Employers are liable for failing to comply with the requirements for completing this form. See below and the Instructions.

ANTI-DISCRIMINATION NOTICE: All employees can choose which acceptable documentation to present for Form I-9. Employers cannot ask employees for documentation to verify information in **Section 1**, or specify which acceptable documentation employees must present for **Section 2** or Supplement B, Reverification and Rehire. Treating employees differently based on their citizenship, immigration status, or national origin may be illegal.

Section 1. Employee Information and Attestation: Employees must complete and sign Section 1 of Form I-9 no later than the **first day of employment**, but not before accepting a job offer.

Last Name (Family Name)	First Name (Given Name)	Middle Initial (if any)	Other Last Names Used (if any)

Address (Street Number and Name)	Apt. Number (if any)	City or Town	State	ZIP Code

Date of Birth (mm/dd/yyyy)	U.S. Social Security Number	Employee's Email Address	Employee's Telephone Number

I am aware that federal law provides for imprisonment and/or fines for false statements, or the use of false documents, in connection with the completion of this form. I attest, under penalty of perjury, that this information, including my selection of the box attesting to my citizenship or immigration status, is true and correct.

Check one of the following boxes to attest to your citizenship or immigration status (See page 2 and 3 of the instructions.):

- ☐ 1. A citizen of the United States
- ☐ 2. A noncitizen national of the United States (See Instructions.)
- ☐ 3. A lawful permanent resident (Enter USCIS or A-Number.)
- ☐ 4. A noncitizen (other than **Item Numbers 2.** and **3.** above) authorized to work until (exp. date, if any)

If you check **Item Number 4.**, enter one of these:

USCIS A-Number	OR	Form I-94 Admission Number	OR	Foreign Passport Number and Country of Issuance

Signature of Employee	Today's Date (mm/dd/yyyy)

If a preparer and/or translator assisted you in completing Section 1, that person MUST complete the Preparer and/or Translator Certification on Page 3.

Section 2. Employer Review and Verification: Employers or their authorized representative must complete and sign **Section 2** within three business days after the employee's first day of employment, and must physically examine, or examine consistent with an alternative procedure authorized by the Secretary of DHS, documentation from List A OR a combination of documentation from List B and List C. Enter any additional documentation in the Additional Information box; see Instructions.

	List A	OR	List B	AND	List C
Document Title 1					
Issuing Authority					
Document Number (if any)					
Expiration Date (if any)					
Document Title 2 (if any)			**Additional Information**		
Issuing Authority					
Document Number (if any)					
Expiration Date (if any)					
Document Title 3 (if any)					
Issuing Authority					
Document Number (if any)					
Expiration Date (if any)			☐ Check here if you used an alternative procedure authorized by DHS to examine documents.		

Certification: I attest, under penalty of perjury, that (1) I have examined the documentation presented by the above-named employee, (2) the above-listed documentation appears to be genuine and to relate to the employee named, and (3) to the best of my knowledge, the employee is authorized to work in the United States.

First Day of Employment (mm/dd/yyyy):

Last Name, First Name and Title of Employer or Authorized Representative	Signature of Employer or Authorized Representative	Today's Date (mm/dd/yyyy)

Employer's Business or Organization Name	Employer's Business or Organization Address, City or Town, State, ZIP Code

For reverification or rehire, complete Supplement B, Reverification and Rehire on Page 4.

New Virtual Inspection Procedure

- Employers must use the alternative procedure consistently for all employees at a given worksite or use it only for remote employees, so long as the employer does not "adopt such a practice for a discriminatory purpose or treat employees differently based on their citizenship, immigration status, or national origin."
- The employee must transmit to the employer a copy of the I-9 document(s) they wish to present. If a document is two-sided, a copy of both the front and back must be transmitted.
- The employer must examine a copy of each I-9 document presented by the employee to ensure that the document(s) appear genuine and related to the employee. If a document is two-sided, a copy of the front and back must be examined.
- The employer must conduct a live video interaction with the employee to ensure that the documents presented reasonably appear to be genuine and related to the employee. The employee must present the document(s) that were transmitted in copy to the employer.

New Virtual Inspection Procedure Cont.

- On the new edition of Form I-9, the employer will be required to check a box indicating that the alternative procedure was used to examine documentation to complete Section 2 of the form or for reverification.
- The employer must retain a clear and legible copy of the document(s) presented. If the document is two-sided, a copy of the front and back must be retained.
- In the event of a government audit or investigation, the employer must make available copies of the I-9 documents presented by the employee.

COVID-19 Physical Inspectations

Set to Expire August 30, 2023

- ❑ Employees who were hired on or after March 20, 2020, and who only received a virtual or remote examination under the COVID-19 temporary flexibilities **MUST** be finalized in I-9 Management; list will be sent to HR Liaisons today (see next slide for additional info).
- ❑ Departments have until **August 30, 2023**, to comply with federal requirements for remote inspection verification.
- ❑ Employees who are not finalized in I-9 Management **MUST** stop working per USCIS' requirements.
- ❑ Departments who already physically verified the new hire's I-9 documents do not have to 'reverify' them; however, they **MUST** finalize the process in I-9 Management. List of remaining employees will be emailed to HR Liaisons after HR Forum today.
- ❑ New flexible review guidelines **CAN BE USED** for this population to complete 'physical inspection' for remaining COVID I-9s.

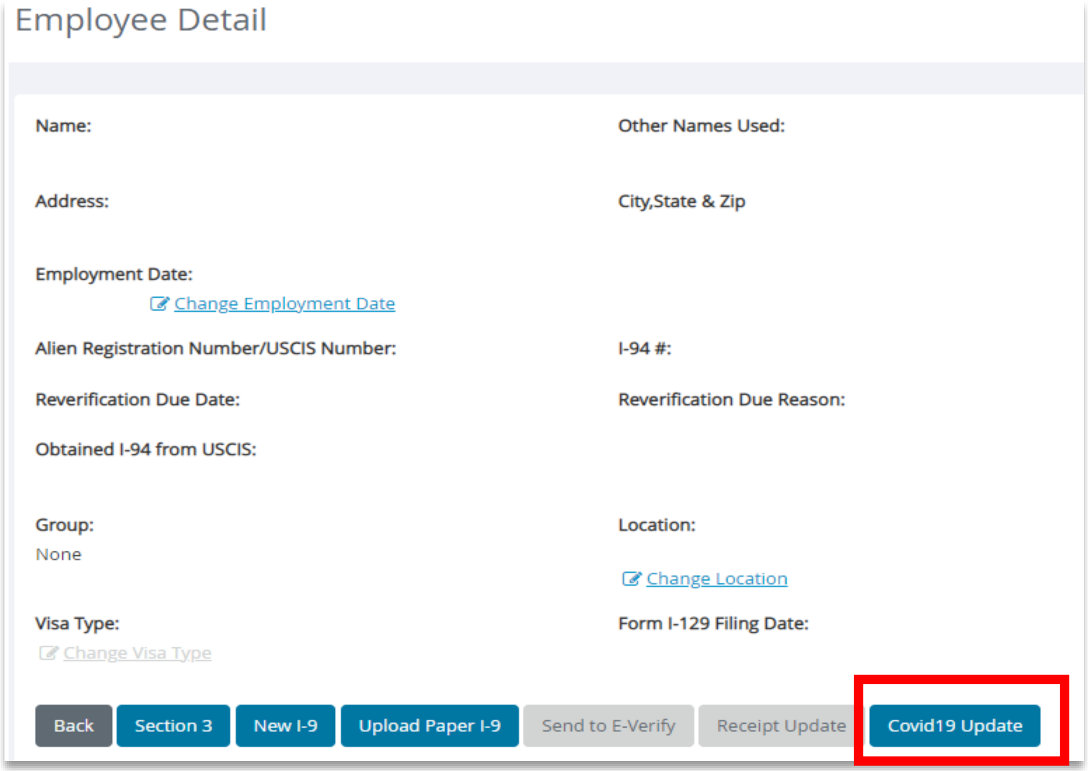
COVID-19 Physical Inspectations

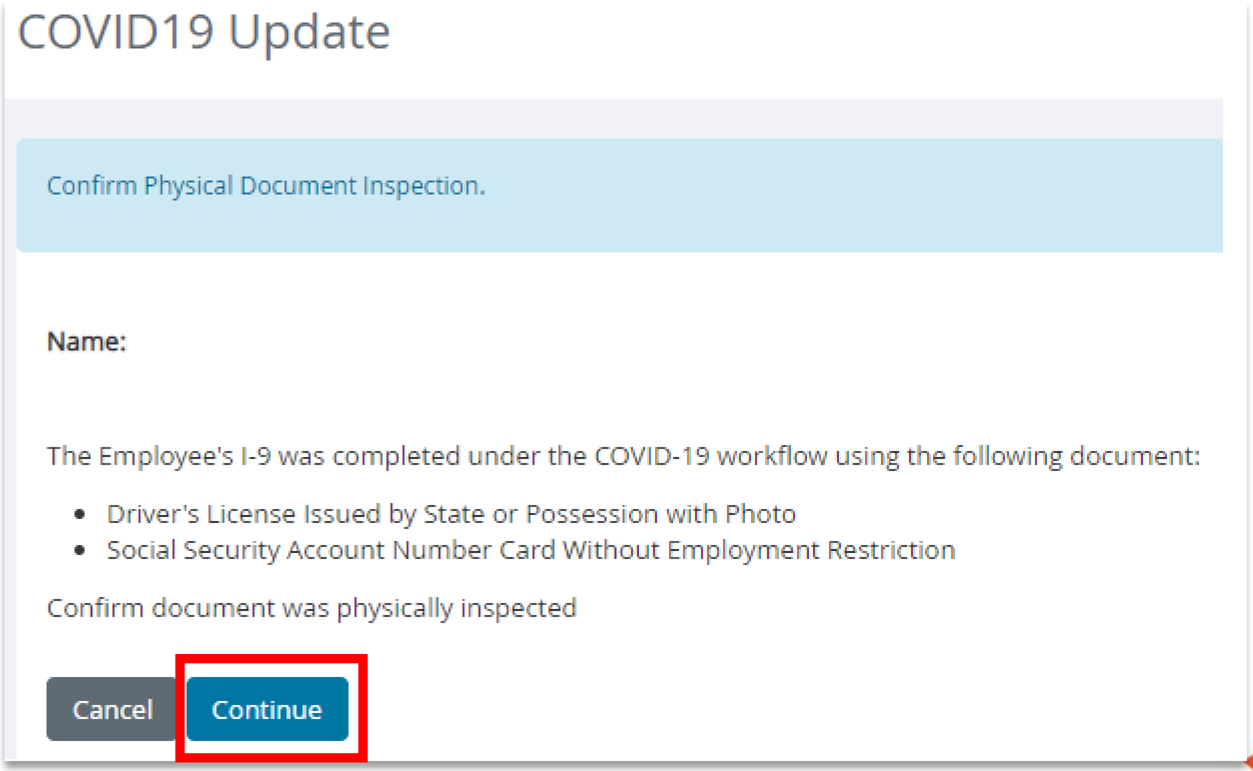
Inspection Process

- ❑ Establish video call
- ❑ Exam documentation
  - ❑ If a document is two-sided, a copy of the front and back must be examined
- ❑ Upload copy of I-9 document(s) to original hire ePAF and Finalize case in I-9 Management
  - ❑ If a document is two-sided, a copy of the front and back must be copied

Note: virtual/physical inspection is only necessary if document(s) were not previously inspected physically. Departments still **MUST** finalize case in I-9 Management.

COVID-19 Physical Inspectations – I-9 Management Navigation





Important Dates

August 7 • New Classes Available

August 23 • Classes Begin

August 31 • CxUF Registration Open

September 6• Next HR Forum

Sepember 12 • GBAS Fall Workshop