



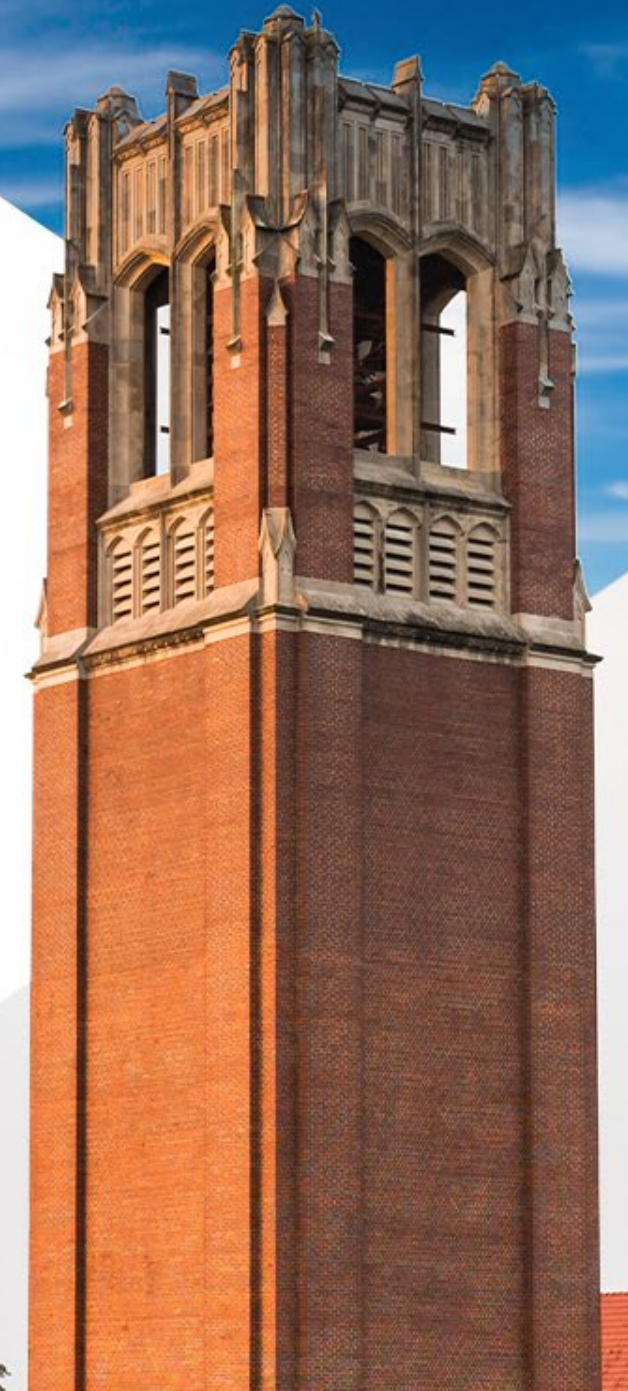
**Human Resources**

# HR Forum

February 1, 2023



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



# Agenda:

- Environmental Health & Safety
- Talent Acquisition & Onboarding
- Benefits
- Employment Operations & Records
- Important Dates



# Environmental Health & Safety

Tara Hetsler



# CareSpot Transition

## OccMed & EH&S Update

### *Positive Feedback*

*38 Health Assessments*

*Vet Med, Facilities, Housing &  
IFAS*

*Ease of Scheduling*

*Results-Quick Turnaround*

*43 Statewide Locations*

### *Opportunities for Improvement*

*Consistency of Results*

*Bloodwork-LabCorp vs. Quest*

*Results Given to Employee to  
Take To Department*

*Duplication of Services @ All  
Locations*

*Additional Staffing @ UF  
OccMed Clinic*

### *Phase 2 Objectives*

*Funding for Future Program &  
Hiring of OccMed Physician*

*Support for Program*

*Post-Employment HA's*

*Medical Monitoring  
Improvements-Pesticide Program  
& Respiratory Protection*

*Policy Updates*

*Website Improvements Ongoing*

# CareSpot Authorization Form

## Update

- One Physical for All Physical Job Duties-
  - Ease of waiver process & cost savings
- Position Number
- Removal of Patient Contact-OccMed Clinic
- Removal of Contact w/Human Blood-Training

Schedule your Information Session:

**Phone:** 392-1591

**Email:** [Thetsler@ufl.edu](mailto:Thetsler@ufl.edu)

**CareSpot**  
Now part of FastMed

**UF UNIVERSITY of FLORIDA**

### Authorization to Treat


Please perform the following services for (Employee Name) \_\_\_\_\_ UF ID Number: \_\_\_\_\_

Employer Name: \_\_\_\_\_ UF Position Number: \_\_\_\_\_  
University of Florida

Pre-employment - New Hire Reason For Visit	Established Employment - Transfer Reason For Visit
<input checked="" type="checkbox"/> Physical Job Demands (COULD include: Climbing, Frequent Reaching Above Shoulder, Heavy Lifting, Kneeling, Repeated Bending, Repetitive Pulling and Pushing)	<input type="checkbox"/> Physical Job Demands (COULD include: Climbing, Frequent Reaching Above Shoulder, Heavy Lifting, Kneeling, Repeated Bending, Repetitive Pulling and Pushing)
<input type="checkbox"/> Animal Contact	<input type="checkbox"/> Animal Contact
<input type="checkbox"/> Bio Path Physical	<input type="checkbox"/> Bio Path Physical
<input type="checkbox"/> HazMat Physical	<input type="checkbox"/> HazMat Physical
<input type="checkbox"/> Pesticide Use	<input type="checkbox"/> Pesticide Use
<input type="checkbox"/> Respirator Use	<input type="checkbox"/> Respirator Use
<input type="checkbox"/> Scientific Diving	<input type="checkbox"/> Scientific Diving

Comments: \_\_\_\_\_

UF Authorized Representative \_\_\_\_\_ Date \_\_\_\_\_

UF Department Field \_\_\_\_\_ 

Find the location nearest you at [CareSpot.com](https://www.carespot.com)

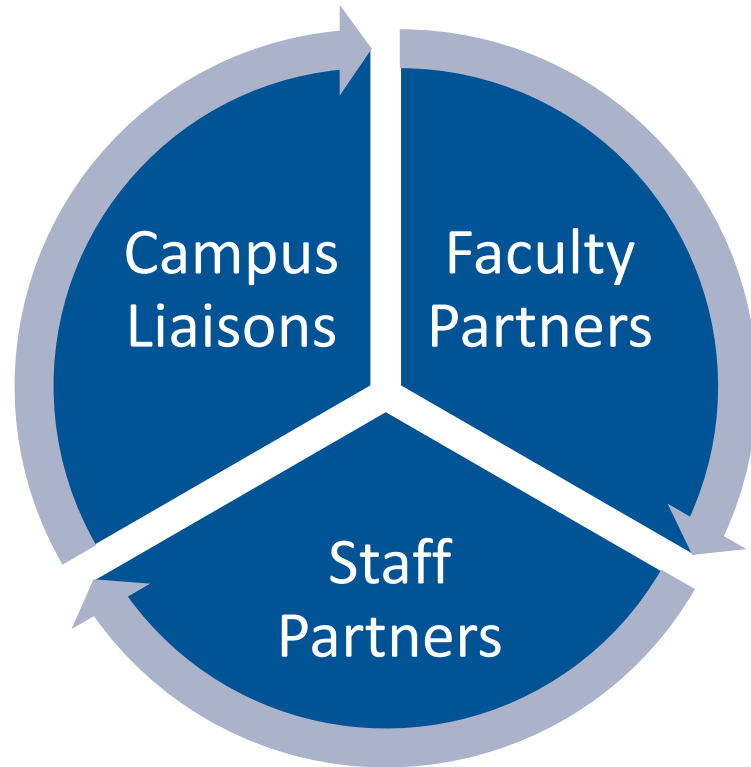


# Talent Acquisition & Onboarding

Mercedes Swan



# Career Collab



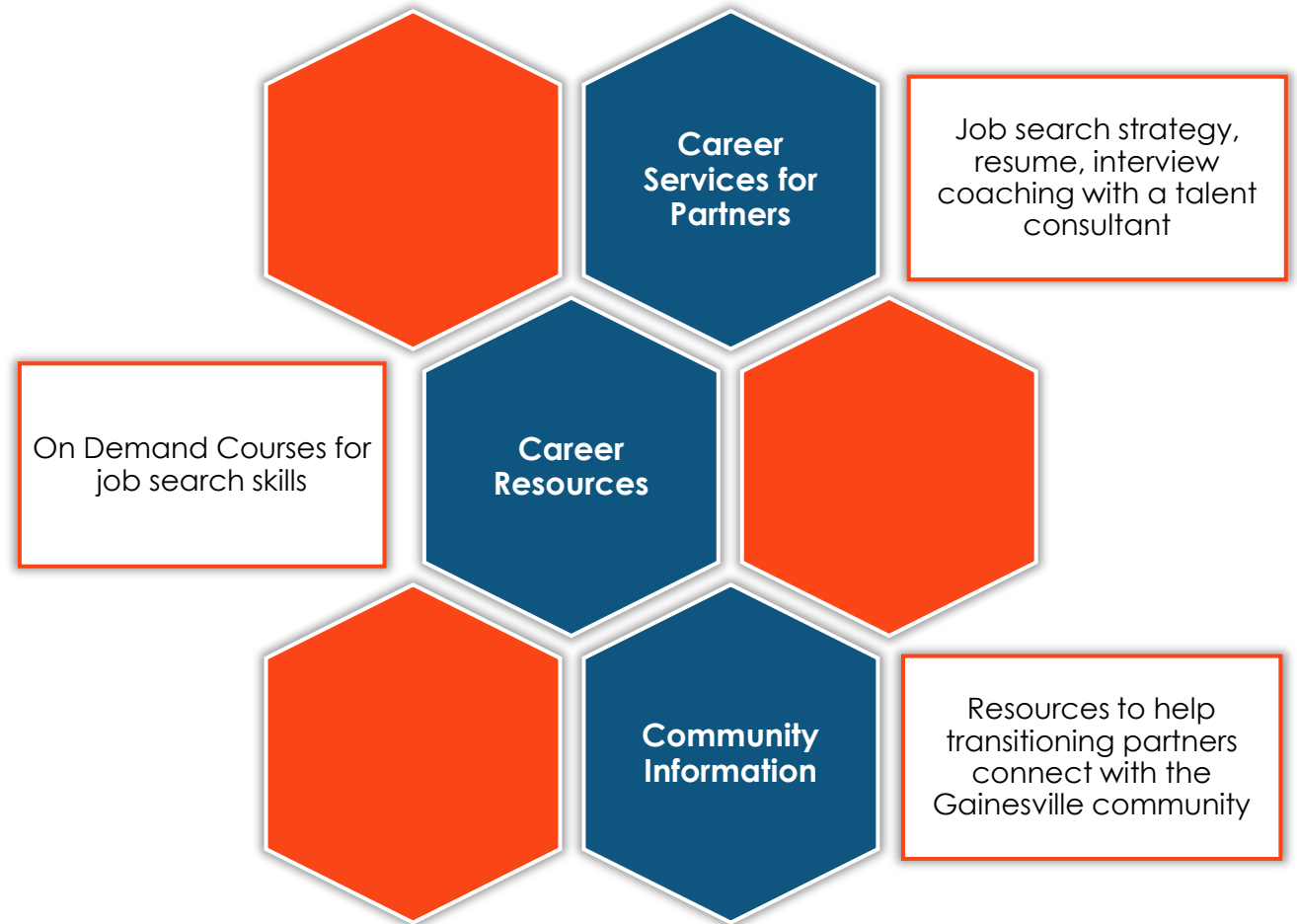
## SUPPORTING DUAL CAREER SPOUSES AND PARTNERS

- Spouses and Partners of faculty and staff who are new employees of the University of Florida.
- Benefit to new employees and partners to aid in the relocation and acclimation to the Gainesville Community.
- Career Collab is separate from the Dual Career Program in the Provosts Office.

# Dual Career Services

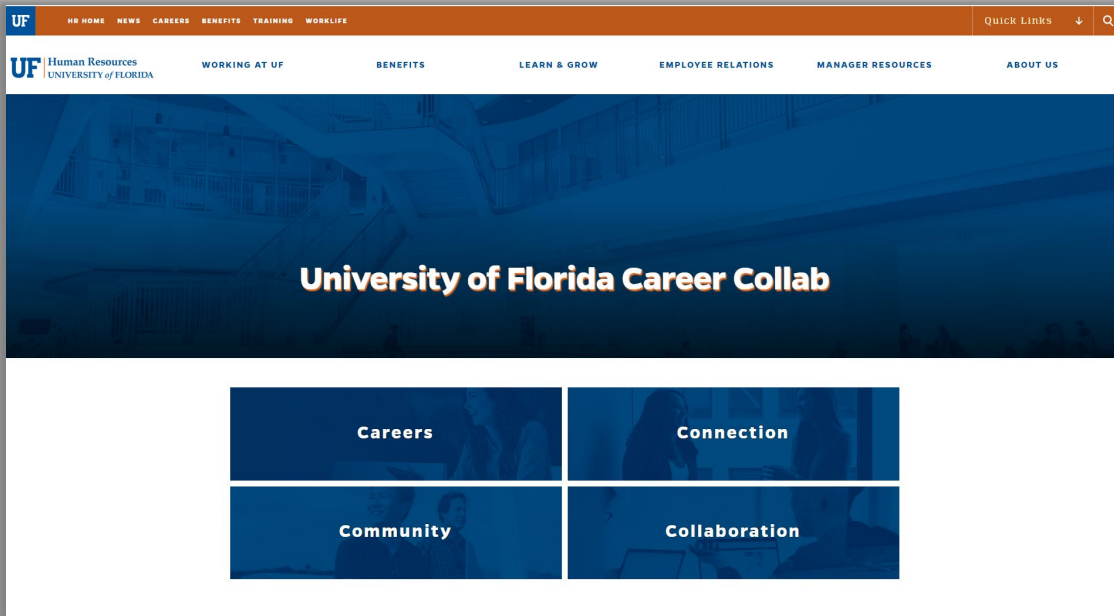
## Elevating Services

- Access
- Increased awareness
- Managing expectations
- Streamlined and centralized process
- Providing consistent services





# Website



- Talent Acquisition and Onboarding invites your feedback at [talent@hr.ufl.edu](mailto:talent@hr.ufl.edu)
- The website will go live on Monday February 6<sup>th</sup>
- <https://hr.ufl.edu/careercollab/>

# University Benefits

Crystal Roncek



# IRS Reporting Form – 1095-C

## Mailing

- Employer Provided Insurance Offer and Coverage
- Reports employees' health insurance information for prior calendar year
- State of Florida and GatorCare plan participants will receive forms within the next several weeks
  - **State** 1095s available in PeopleFirst beginning 1/31, if you opted for electronic delivery
  - **GatorCare** 1095s are sent by postal mail only (no electronic option)
- Employees may file income tax returns **prior** to receiving 1095-C if they know they had coverage for the entire year
- Employees enrolled in ACA Marketplace plans must report UF's offer of employer-sponsored health coverage to IRS

# Services Following UF Retirement




# Services Following UF Retirement


- In January's HR Forum, we informed you about the State of Florida Division of Retirement's (DOR) restrictions on services that can be provided by retired UF employees and emeritus faculty.
- The DOR has specified that retirement with the State occurs when:
  - An **FRS Pension Plan (FRS PP)** participant (1) separates employment from all FRS state agencies (2) established a retirement date through the application process with the State, **AND** (3) has cashed or deposited their defined benefit payment.
    - *If DROP participant, retirement is defined by when the UF employee separates from service.*




# Services Following UF Retirement

- An **FRS Investment Plan (FRS IP)** participant (1) separates employment from all FRS state agencies, **AND** (2) files a request to receive a distribution or withdrawal from their defined contribution account.
  - A **State University System Optional Retirement Program (SUSORP)** participant (1) separates employment from all FRS state agencies, **AND** (2) files a request to receive a distribution or withdrawal from their defined contribution account.
  - If determined a "retired" participant by the State of Florida, the individual cannot prearrange or accept a role (paid or unpaid) that provides services in any capacity in the first 6 months following retirement.
- 

# Services Following UF Retirement

- Terms to Know
    - **Retirement**
      - UF v. State of Florida
    - **Form of Payment**
      - distribution v. withdrawal
    - **Plan Type**
      - defined benefit v. defined contribution
- 

# Services Following UF Retirement

- During months 7-12 following retirement, FRS PP pension plan participants must suspend retirement benefits in order for the retiree to provide services.
  - FRS Investment Plan and SUSORP participants may provide services in months 7-12, if a distribution was received. However, if the retiree is receiving a withdrawal, the benefit must be suspended in order for the retiree to provide services.
  - Emeritus status alone does not conflict with the DOR guidance, unless services (paid or unpaid) are provided.
  - Serving on graduate committees, active participation on departmental committees, volunteering, advising, consulting, participating in poll activities, and fundraising are considered providing 'service' regardless paid or unpaid.
  - We continue to have dialogue with the DOR.
  - Comprehensive information will be shared when we receive further guidance from the DOR.
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# Employment Operations & Records

Johannes Traster



# Employment Operations & Records Business Model

## Piloting New Service Model

- Student HR Assistants
  - Behind the scenes assisting with requests via email and phone
    - Employment verifications, system troubleshooting, E-Verify, and much much more!
- Campus Visits
  - Opportunity to connect, have open discussions on policies and processes, and provide specific trainings on various topics
  - Interested? Please contact Johannes Traster at [jtraster2-hr@ad.ufl.edu](mailto:jtraster2-hr@ad.ufl.edu)
  - For general inquiries please contact us at [ufhr-employment@ufl.edu](mailto:ufhr-employment@ufl.edu); 352-273-1079





# Appointment Letter Library

## Updates

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### New Offer Letters

- ☐ OPSN & OPSE
- ☐ Courtesy Faculty
- ☐ General Addendum

### Updated Offer Letters

- ☐ Graduate Assistants (all templates)

### Record of Revisions

- ☐ Includes date of updates and the description of changes
  - ☐ Additions, modifications, removals, etc.

# Courtesy Faculty Project

## History of the Project

- ☐ Goal – Create Policy & Procedures
- ☐ Kicked Off in February 2022
- ☐ HR Liaisons
  - ☐ IFAS, Engineering, COM, Dentistry, Vet Med, Pharmacy
- ☐ Evaluation of Current State
  - ☐ How many do we have?
  - ☐ Is there a review process?
  - ☐ Where are they located for?
  - ☐ What do we use this affiliation for?
  - ☐ What does this give them access to?
  - ☐ When do we terminate appointments?

The background of the slide is a photograph of a calm river or lake. The water reflects the sky and the surrounding landscape. On the right side, there is a stone building, possibly a bridge or a part of a castle. The trees along the banks have autumn foliage in shades of red, orange, and yellow. The sky is a pale blue.

# Current Landscape

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Courtesy Faculty appointments are used for:

- Preceptors
- County Extension
- Collaborative Research
- Scholars
- Research
- Graduate Faculty
- Patient Care
- Clinic Oversights

# Current Landscape

## Requirements Varied

Bachelor's Degree Master's Degree Terminal Degree	Offer Letters Voting Background Checks Health Assessments Email Offers	No Time Limit 2-Year Limit 5-Year Limit
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## Review & Termination

- No Cadence For Review
- Review Population Quarterly
- Review Population Bi-Annually
- Review Population Annually

## Provides Access to:

- System Access
  - Zoom License
  - DUO Authentication
  - Microsoft Office 365 (Email)
- UFID
- GatorLink
- P-Card Access
- Library Access
- Building Access
- Wall Street Journal & NY Times

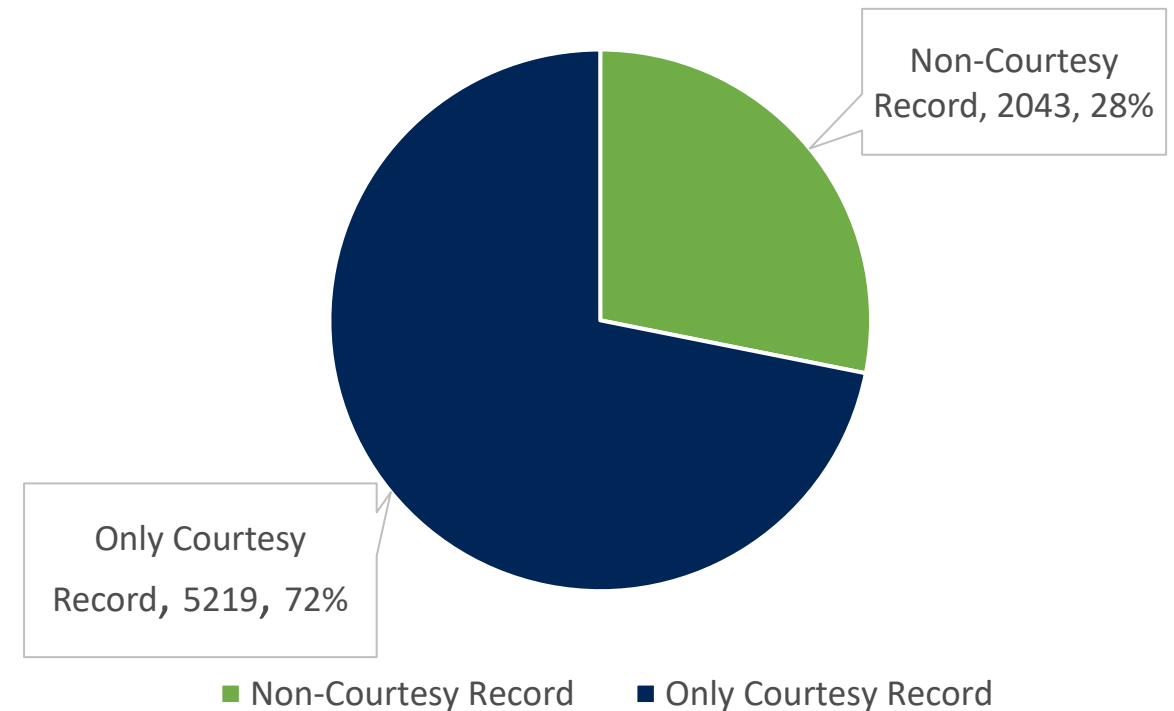
# Current Landscape

Total Courtesy Faculty Headcount – 7,262

## Interesting Data Points

- ❑ 2,108 courtesy faculty for over 10yrs
- ❑ 51 courtesy appointments for over 40yrs
- ❑ 3 courtesy appointments for more than 60yrs
- ❑ The oldest age is 121
- ❑ The youngest age is 23
- ❑ 10 courtesy faculty are 100 years old +
- ❑ The average courtesy appointment is 8yrs
- ❑ The average age of a courtesy faculty is 51

## Courtesy Appointments







# Policy

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## **Policy Statement**

University departments and academic units that engage courtesy faculty must enter each courtesy faculty into the myUFL system. Courtesy faculty appointments may be issued for up to 5 years and may be renewable after the initial 5 years. If departments fail to confirm active courtesy appointments on a yearly basis through the Courtesy Faculty Review File, all courtesy appointments in the department will be automatically terminated. Departments and academic units are responsible for oversight of all courtesy faculty services, as well as for assessing risk associated with courtesy faculty services.


# Policy

## Definitions:

There are 3 types of courtesy faculty modifiers:

- a) **Courtesy (CO)** - This modifier should be used for those individuals not currently employed by the University of Florida in any other capacity.
- b) **Joint\* (JNT)** – This modifier should be used to designate an employed faculty member who is performing responsibilities in teaching or graduate supervision in another department on a regular basis
- c) **Affiliate\* (AFFL)** – This modifier should be used to designate an employed faculty member's participation in some function of another department on an infrequent or occasional basis

\* The affiliate and joint designations identify those individuals who have another appointment(s) on campus, whereas the standard “CO” courtesy modifiers are exclusive to non-UF employees.





# Policy

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## 4.2 Screening

- Background checks are recommended. The appropriate level of background check must be completed prior to beginning to work with minors; verification of check shall be on file for a minimum for five years
  - Research and research support positions are required to undergo additional screening conducted in collaboration between UFHR and UFRISC
  - Courtesy faculty who are listed as Key Personnel in UFIRST are required to disclose reportable outside activities and financial interests through UFOLIO
- 




# Policy

## Requirements

- Curriculum Vitae
- Offer letter with a start and end date
  - Approval from dean or vice president, per college of unit policy and procedure
  - Outlines responsibilities and assignment, duties
  - Include explanation of how the appointment will benefit the applicant, the department, and the college
- Social Security number for entry into myUFL – a copy of the card is not needed

## If Applicable

- Approved Employment of Relatives email, see [4.8 Nepotism](#)
  - Work authorizations and approvals, see [4.9 Limitations](#)
  - Verification of rehire-ability
    - Only if receiving benefits under the Florida Retirement System (FRS) during the first 12 calendar months after effective retirement date, see [4.9 Limitations](#)
- 

# Courtesy Faculty Review File & Process

## Moving Forward

### File Specifics

- ☐ Opens: March 1, 2023
- ☐ Closes: March 24, 2023
- ☐ Termination rows will load on April 3, 2023, with an effective date of March 31, 2023
- ☐ All courtesy appointments will have the box checked for termination
  - ☐ The appointments that the college/unit does not want to termination will need to be **unchecked**
- ☐ All courtesy appointments older than 5 years **must be** renewed w/letter
  - ☐ Reappointments shall be entered via Hire ePAF effective 3/31/23 since initial appointment **will be** set to term in file

The Courtesy Faculty Review File is located at:

**Main Menu > Human Resources > Workforce Administration > Job Information > UF Appointment Review**

\*New hires entered on **2/1/23** shall adhere to policy with the new requirements

Webpage: <https://hr.ufl.edu/manager-resources/employment-hub/non-employee-appointments/>



# Important Dates

- February 17 – GBAS Workshop
- March 1<sup>st</sup> – Courtesy Faculty File Opens
  - Closes March 24<sup>th</sup>
- March 1<sup>st</sup> – Next HR Forum

