Agenda

Fidelity
• JT Carpenter | Gene Varela

Training & Organizational Dev
• Shannon Powell

Employment Operations & Records
• Johannes Traster

Important Dates
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
Helping participants get answers when and how they need it.

Real questions. Real-time answers.

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.

Employees need a convenient way to get quick answers to their questions we provide an easy way to get help

**What**
- Enrolling and investing
- Reviewing plan options
- Understanding plan changes
- Transitioning to Retirement

**How**
- Hosted by Fidelity:
  - Short presentation followed by Q&A
  - Questions submitted before/during event
  - Demos of NetBenefits
- Event promotion:
  - Email invitation
  - NetBenefits messaging
  - Client promotions
  - Newsletter teasers
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 Consultant¹
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.

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 & Advice²
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.

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

The sessions cover foundational financial topics including how to save, enroll, and invest.

¹Episodes feature a live channel call-to-action
²Only available for plans that offer FPPA.
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 pay off 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 plan so you can optimize your saving and investing to help you reach them.

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 does not provide legal or tax advice. The information herein is general in nature and should not be considered legal or tax advice. Consult an attorney or tax professional regarding your specific situation.
Training & Organizational Development

Shannon Powell
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/
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
Employment Operations & Records

Johannes Traster
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
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/](https://hr.ufl.edu/manager-resources/recruitment-staffing/researcher-screening/)
  - EOR: [https://hr.ufl.edu/manager-resources/employment-hub/non-employee-appointments/](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](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

**Form I-9**  
OBS No. 015-0897  
Expiry 07/31/2022

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**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.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
<td>Last Name (Family Name)</td>
<td>Employee’s last name</td>
</tr>
<tr>
<td>First Name (Given Name)</td>
<td>Employee’s first name</td>
</tr>
<tr>
<td>Middle Initial (If any)</td>
<td>Employee’s middle initial (if any)</td>
</tr>
<tr>
<td>Other Last Names Used (If any)</td>
<td>Employee’s other last names used (if any)</td>
</tr>
<tr>
<td>Address (Street Number and Name)</td>
<td>Employee’s address</td>
</tr>
<tr>
<td>Apt. Number (If any)</td>
<td>Employee’s apartment number (if any)</td>
</tr>
<tr>
<td>City and Town</td>
<td>Employee’s city and town</td>
</tr>
<tr>
<td>State and ZIP Code</td>
<td>Employee’s state and ZIP code</td>
</tr>
<tr>
<td>Date of Birth (mm/dd/yyyy)</td>
<td>Employee’s date of birth</td>
</tr>
<tr>
<td>U.S. Social Security Number</td>
<td>Employee’s Social Security number</td>
</tr>
<tr>
<td>Employee’s Email Address</td>
<td>Employee’s email address</td>
</tr>
<tr>
<td>Employee’s Telephone Number</td>
<td>Employee’s telephone number</td>
</tr>
</tbody>
</table>

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**Check one of the following boxes to attest to your citizenship or immigration status:**

- [ ] A citizen of the United States
- [ ] A national of the United States (see instructions)
- [ ] A lawful permanent resident (Enter USCIS Alien Number)
- [ ] A lawful permanent resident (Enter USCIS Alien Number)
- [ ] A lawful permanent resident (Enter USCIS Alien Number)
- [ ] A lawful permanent resident (Enter USCIS Alien Number)
- [ ] A lawful permanent resident (Enter USCIS Alien Number)

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**Signature of Employee:**  
Today’s Date (mm/dd/yyyy)

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*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.*

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**Section 2. Employer Review and Verification:** Employers or their authorized representatives 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.

**Table:**

<table>
<thead>
<tr>
<th>Document Title 1</th>
<th>List A</th>
<th>List B</th>
<th>List C</th>
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<tbody>
<tr>
<td>Issuing Authority</td>
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<td>Document Number (If any)</td>
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<td>Document Title 3 (If any)</td>
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<td>Expiration Date (If any)</td>
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**Additional Information:**

**Certification:** Under penalty of perjury, that I have examined the documentation presented by the above-named employee, 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.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Day of Employment (mm/dd/yyyy)</td>
<td>Employee’s first day of employment</td>
</tr>
<tr>
<td>Last Name, First Name and Title of Employee or Authorized Representative</td>
<td>Employee’s last name, first name, and title</td>
</tr>
<tr>
<td>Signature of Employee or Authorized Representative</td>
<td>Employee’s signature or authorized representative’s signature</td>
</tr>
<tr>
<td>Today’s Date (mm/dd/yyyy)</td>
<td>Date of signing</td>
</tr>
</tbody>
</table>

**Employer’s Business or Organization Name:**

**Employer’s Business or Organization Address:**

**City, State, ZIP Code:**

*For revalidation or rehires, 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 Inspections

Set to Expires 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

Employee Detail

- Name:
- Address:
- Employment Date:
- Social Security Number:
- Reverification Due Date:
- Employment Type:
- Group:
- Visa Type:

COVID19 Update

- Confirm Physical Document Inspection:
  - Name:
  - Date of Birth:
  - Address:
  - City, State, Zip:
  - Email:
  - Phone:

- The Employee's I-9 was completed under the COVID-19 workflow using the following document:
  - Driver's License Issued by State or Possession with Photo
  - Social Security Account Number Card Without Employment Restriction

- Confirm document was physically inspected

- Continue
- Cancel
Important Dates

August 7 • New Classes Available
August 23 • Classes Begin
August 31 • CxUF Registration Open
September 6 • Next HR Forum
September 12 • GBAS Fall Workshop