



# Welcome to the City of Madison

Employee Orientation





# Agenda

- ✓ Associations Presentation
- City of Madison Mission, Vision, Values, and Service Promise
- Racial Equity and Social Justice at the City
- Administrative Procedure Memoranda (APMs)
- Employee Assistance Program (EAP)
- Employee Perks
- Initial Employment Forms
- Pay & Leave Benefits
- Insurance & Other Benefits

✓ Check it off as you go!  
✓ Sign, date, and return to Human Resources by required deadlines.

# City of Madison Mission, Vision, Values, and Service Promise



**Welcome to the City of Madison!**



## Equity

We are committed to fairness, justice, and equal outcomes for all.



## Civic Engagement

We believe in transparency, openness, and inclusivity. We will protect freedom of expression and engagement.



## Well-Being

We are committed to creating a community where all can thrive and feel safe.



## Shared Prosperity

We are dedicated to creating a community where all are able to achieve economic success and social mobility.



## Stewardship

We will care for our natural, economic, fiscal, and social resources.

**When you think about the City of Madison's values, what do you think these might look/sound/feel like for YOU in your new role?**

# Racial Equity and Social Justice at the City



Another great resource: the [Equity and Social Justice Booklet](#) from the [Department of Civil Rights \(DCR\)](#)!

■ [RESJI@CITYOFMADISON.COM](mailto:RESJI@CITYOFMADISON.COM)  
FOR MORE INFORMATION





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City Rules (APMs)  
Employee Assistance Program  
Employee Perks

# Mayoral Administrative Procedure Memoranda (APMs)

- APMs are rules that guide **ALL** City employees at work and ensure a welcoming, safe, and fair environment for all employees and members of the community.
- You can find all APMs on EmployeeNet. Copies of some core APMs are also in your orientation bag.
- Also included in your orientation bag is information about:
  - The City Ethics Code
  - IT Records Management
  - Worker's Compensation



# Employee Assistance Program (EAP)

- The City's EAP provides confidential, **free** services designed to help City of Madison employees, families of employees, and employee spouses or significant others prevent or resolve personal, family, and workplace problems.

- **Services**

- Information, support, and resource referral
- Connections Newsletter
- Critical Incident Stress Management
- Free Trainings
- Webpage: [www.cityofmadison.com/employee-assistance-program](http://www.cityofmadison.com/employee-assistance-program)
- Email: [EAP@cityofmadison.com](mailto:EAP@cityofmadison.com)
- Phone: (608) 266-6561 (internal) | 1-800-236-7905 (external 24/7 EAP)



# City of Madison Employee Perks

- Free Tap Card Bus Pass
- [Affinity and Identity-Based Groups](#)
- Trainings available through HR
- Madison Credit Union
- [Well Wisconsin Program](#) + \$150 Wellness Incentive
- Discounts
  - Nationwide Pet Insurance
  - Select Overture Center Performances
  - Cell Phone Plans (check with your provider)
  - Dell Employee Purchase Program



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# Initial Employment Forms

# W-4 Federal Withholding Form



- Complete all applicable sections of form
- Make sure you sign and date the document and put your SSN in box 1b!
- Utilize the Multiple Jobs worksheet (if needed)

**Note:** You can make updates to tax withholding at any time either via the Employee Self Service (ESS) portal or by submitting a new form to your Payroll Clerk/HR!  
Please ask your Payroll Clerk for more details about ESS.

Form <b>W-4</b> Employee's Withholding Certificate		OMB No. 1545-0074
Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay. Give Form W-4 to your employer. Your withholding is subject to review by the IRS.		2026
Department of the Treasury Internal Revenue Service		
<b>Step 1:</b> Enter Personal Information	(a) First name and middle initial Last name Address City or town, state, and ZIP code	(b) Social security number  Does your name match the name on your social security card? If not, to ensure you get credit for your earnings, contact SSA at 800-772-1213 or go to www.ssa.gov.
	<input type="checkbox"/> Single or Married filing separately <input type="checkbox"/> Married filing jointly or Qualifying surviving spouse <input type="checkbox"/> Head of household (Check only if you're unmarried and pay more than half the costs of keeping up a home for yourself and a qualifying individual.) Caution: To claim certain credits or deductions on your tax return, you (and/or your spouse if married filing jointly) are required to have a social security number valid for employment. See page 2 for more information.	
<b>TIP:</b> Consider using the estimator at <a href="http://www.irs.gov/W4App">www.irs.gov/W4App</a> to determine the most accurate withholding for the rest of the year if you are completing this form after the beginning of the year, expect to work only part of the year, or have changes during the year in your marital status, number of jobs for you (and/or your spouse if married filing jointly), dependents, other income (not from jobs), deductions, or credits. Have your most recent pay stub(s) from this year available when using the estimator. At the beginning of next year, use the estimator again to recheck your withholding.		
<b>Complete Steps 2-4 ONLY if they apply to you; otherwise, skip to Step 5.</b> See page 2 for more information on each step, who can claim exemption from withholding, and when to use the estimator at <a href="http://www.irs.gov/W4App">www.irs.gov/W4App</a> .		
<b>Step 2:</b> Multiple Jobs or Spouse Works	Complete this step if you (1) hold more than one job at a time, or (2) are married filing jointly and your spouse also works. The correct amount of withholding depends on income earned from all of these jobs. Do <b>only one</b> of the following. (a) Use the estimator at <a href="http://www.irs.gov/W4App">www.irs.gov/W4App</a> for the most accurate withholding for this step (and Steps 3-4). If you or your spouse have self-employment income, use this option; or (b) Use the Multiple Jobs Worksheet on page 3 and enter the result in Step 4(c) below; or (c) If there are only two jobs total, you may check this box. Do the same on Form W-4 for the other job. This option is generally more accurate than Step 2(b) if pay at the lower paying job is more than half of the pay at the higher paying job. Otherwise, Step 2(b) is more accurate.	
<b>Complete Steps 3-4(b) on Form W-4 for only ONE of these jobs.</b> Leave those steps blank for the other jobs. (Your withholding will be most accurate if you complete Steps 3-4(b) on the Form W-4 for the highest paying job.)		
<b>Step 3:</b> Claim Dependent and Other Credits	If your total income will be \$200,000 or less (\$400,000 or less if married filing jointly): (a) Multiply the number of qualifying children under age 17 by \$2,200 . . . . . 3(a) \$ (b) Multiply the number of other dependents by \$500 . . . . . 3(b) \$ Add the amounts from Steps 3(a) and 3(b), plus the amount for other credits. Enter the total here . . . . . 3 \$	
<b>Step 4:</b> Other Adjustments	(a) <b>Other income (not from jobs).</b> If you want tax withheld for other income you expect this year that won't have withholding, enter the amount of other income here. This may include interest, dividends, and retirement income . . . . . 4(a) \$ (b) <b>Deductions.</b> Use the Deductions Worksheet on page 4 to determine the amount of deductions you may claim, which will reduce your withholding. (If you skip this line, your withholding will be based on the standard deduction.) Enter the result here . . . . . 4(b) \$ (c) <b>Extra withholding.</b> Enter any additional tax you want withheld each pay period . . . . . 4(c) \$	
Exempt from withholding	I claim exemption from withholding for 2026, and I certify that I meet <b>both</b> of the conditions for exemption for 2026. See Exemption from withholding on page 2. I understand I will need to submit a new Form W-4 for 2027 . . . . . <input type="checkbox"/>	
<b>Step 5:</b> Sign Here	Under penalties of perjury, I declare that this certificate, to the best of my knowledge and belief, is true, correct, and complete.	
	Employee's signature (This form is not valid unless you sign it.)	Date
<b>Employers Only</b>	Employer's name and address	First date of employment Employer identification number (EIN)

# WT-4 – Wisconsin Withholding Form



- ❑ Enter total exemptions on line 1(d)
- ❑ Make sure you sign and date the document and put your SSN and DOB on the form!



**Note:** You can make updates to tax withholding at any time either via the Employee Self Service (ESS) portal or by submitting a new form to your Payroll Clerk/HR! Please ask your Payroll Clerk for more details about ESS.

**WT-4**

### Employee's Wisconsin Withholding Exemption Certificate/New Hire Reporting

**Employee's Section** (Print clearly)

Employee's legal name (first name, middle initial, last name)			Social security number	<input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Married, but withhold at higher Single rate. <small>Note: If married, but legally separated, check the Single box.</small>
Employee's address (number and street)			Date of birth	
City	State	Zip code	Date of hire	

**FIGURE YOUR TOTAL WITHHOLDING EXEMPTIONS BELOW**  
Complete Lines 1 through 3

1. (a) Exemption for yourself – enter 1 .....

(b) Exemption for your spouse – enter 1 .....

(c) Exemption(s) for dependent(s) – you are entitled to claim an exemption for each dependent .....

(d) Total – add lines (a) through (c) .....

2. Additional amount per pay period you want deducted (if your employer agrees) .....

3. I claim complete exemption from withholding (see instructions). Enter "Exempt" .....

I CERTIFY that the number of withholding exemptions claimed on this certificate does not exceed the number to which I am entitled. If claiming complete exemption from withholding, I certify that I incurred no liability for Wisconsin income tax for last year and that I anticipate that I will incur no liability for Wisconsin income tax for this year.

Signature \_\_\_\_\_ Date Signed \_\_\_\_\_

# I-9 Employment Eligibility Verification



- Not necessary for current employees\*
- Complete the top portion – **it is not necessary to include your social security number on this page**
- Must have 1 document from List A, **or** 1 document **each** from Lists B and C
- Section 1 **must** be completed on the day of hire
- Section 2 (Verification) **must** be completed within 3 business days of hire to comply with Federal regulations

\*A rehired employee who last worked less than 1 year prior to the rehire date is not required to complete a new I-9.

# 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 05/31/2027



**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	
<p>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.</p> <p>Check one of the following boxes to attest to your citizenship or immigration status. (See page 2 and 3 of the instructions.)</p> <p><input type="checkbox"/> 1. A citizen of the United States</p> <p><input type="checkbox"/> 2. A noncitizen national of the United States (See Instructions.)</p> <p><input type="checkbox"/> 3. A lawful permanent resident (Enter USCIS or A-Number.)</p> <p><input type="checkbox"/> 4. An alien authorized to work until (exp. date, if any)</p> <p>If you check item Number 4., enter one of these:</p> <p>USCIS A-Number OR Form I-94 Admission Number OR Foreign Passport Number and Country of Issuance</p>						
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)				
<input type="checkbox"/> 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.

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.

# I-9 Form – List of Acceptable Documents



## LISTS OF ACCEPTABLE DOCUMENTS

All documents containing an expiration date must be unexpired.

\* Documents extended by the issuing authority are considered unexpired.

Employees may present one selection from List A or a combination of one selection from List B and one selection from List C.

Examples of many of these documents appear in the Handbook for Employers (M-274).

LIST A Documents that Establish Both Identity and Employment Authorization	OR	LIST B Documents that Establish Identity	AND	LIST C Documents that Establish Employment Authorization
<ol style="list-style-type: none"> <li>1. U.S. Passport or U.S. Passport Card</li> <li>2. Permanent Resident Card or Alien Registration Receipt Card (Form I-551)</li> <li>3. Foreign passport that contains a temporary I-551 stamp or temporary I-551 printed notation on a machine-readable immigrant visa</li> <li>4. Employment Authorization Document that contains a photograph (Form I-766)</li> <li>5. For an individual temporarily authorized to work for a specific employer because of his or her status or parole:               <ol style="list-style-type: none"> <li>a. Foreign passport; and</li> <li>b. Form I-94 or Form I-94A that has the following:                   <ol style="list-style-type: none"> <li>(1) The same name as the passport; and</li> <li>(2) An endorsement of the individual's status or parole as long as that period of endorsement has not yet expired and the proposed employment is not in conflict with any restrictions or limitations identified on the form.</li> </ol> </li> </ol> </li> <li>6. Passport from the Federated States of Micronesia (FSM) or the Republic of the Marshall Islands (RMI) with Form I-94 or Form I-94A indicating nonimmigrant admission under the Compact of Free Association Between the United States and the FSM or RMI</li> </ol>		<ol style="list-style-type: none"> <li>1. Driver's license or ID card issued by a State or outlying possession of the United States provided it contains a photograph or information such as name, date of birth, gender, height, eye color, and address</li> <li>2. ID card issued by federal, state or local government agencies or entities, provided it contains a photograph or information such as name, date of birth, gender, height, eye color, and address</li> <li>3. School ID card with a photograph</li> <li>4. Voter's registration card</li> <li>5. U.S. Military card or draft record</li> <li>6. Military dependent's ID card</li> <li>7. U.S. Coast Guard Merchant Mariner Card</li> <li>8. Native American tribal document</li> <li>9. Driver's license issued by a Canadian government authority</li> </ol> <p><b>For persons under age 18 who are unable to present a document listed above:</b></p> <ol style="list-style-type: none"> <li>10. School record or report card</li> <li>11. Clinic, doctor, or hospital record</li> <li>12. Day-care or nursery school record</li> </ol>		<ol style="list-style-type: none"> <li>1. A Social Security Account Number card, unless the card includes one of the following restrictions:               <ol style="list-style-type: none"> <li>(1) NOT VALID FOR EMPLOYMENT</li> <li>(2) VALID FOR WORK ONLY WITH INS AUTHORIZATION</li> <li>(3) VALID FOR WORK ONLY WITH DHS AUTHORIZATION</li> </ol> </li> <li>2. Certification of report of birth issued by the Department of State (Forms DS-1350, FS-545, FS-240)</li> <li>3. Original or certified copy of birth certificate issued by a State, county, municipal authority, or territory of the United States bearing an official seal</li> <li>4. Native American tribal document</li> <li>5. U.S. Citizen ID Card (Form I-197)</li> <li>6. Identification Card for Use of Resident Citizen in the United States (Form I-179)</li> <li>7. Employment authorization document issued by the Department of Homeland Security</li> </ol> <p>For examples, see <b>Section 7</b> and <b>Section 13</b> of the M-274 on <a href="http://uscis.gov/i-9-central">uscis.gov/i-9-central</a>.</p> <p>The Form I-766, Employment Authorization Document, is a List A, <b>Item Number 4</b>, document, not a List C document.</p>

# Self-Identification Form & Emergency Contact



## Self-Identification Form

- Allows for reporting requirements to be met in compliance with Federal Law
- Disclosure is voluntary

## Emergency Contact Form

- Complete entire form
- Sign and date



# Declaration of Disability Form



- Please complete the entire form whether you are declaring a disability or not
- Allows Accommodations Specialist to initiate discussions about reasonable accommodations

Form CC-305  
Page 1 of 1

OMB Control Number 1250-0005  
Expires 04/30/2026

Name (Print): \_\_\_\_\_ Date: \_\_\_\_\_  
Signature: \_\_\_\_\_

**Why are you being asked to complete this form?**

We are a federal contractor or subcontractor. The law requires us to provide equal employment opportunity to qualified people with disabilities. We have a goal of having at least 7% of our workers as people with disabilities. The law says we must measure our progress towards this goal. To do this, we must ask applicants and employees if they have a disability or have ever had one. People can become disabled, so we need to ask this question at least every five years.

Completing this form is voluntary, and we hope that you will choose to do so. Your answer is confidential. No one who makes hiring decisions will see it. Your decision to complete the form and your answer will not harm you in any way. If you want to learn more about the law or this form, visit the U.S. Department of Labor's Office of Federal Contract Compliance Programs (OFCCP) website at [www.dol.gov/ofccp](http://www.dol.gov/ofccp).

**How do you know if you have a disability?**

A disability is a condition that substantially limits one or more of your "major life activities." If you have or have ever had such a condition, you are a person with a disability. **Disabilities include, but are not limited to:**

- Alcohol or other substance use disorder (not currently using drugs illegally)
- Autoimmune disorder, for example, lupus, fibromyalgia, rheumatoid arthritis, HIV/AIDS
- Blind or low vision
- Cancer (past or present)
- Cardiovascular or heart disease
- Celiac disease
- Cerebral palsy
- Deaf or serious difficulty hearing
- Diabetes
- Disfigurement, for example, disfigurement caused by burns, wounds, accidents, or congenital disorders
- Epilepsy or other seizure disorder
- Gastrointestinal disorders, for example, Crohn's Disease, irritable bowel syndrome
- Intellectual or developmental disability
- Mental health conditions, for example, depression, bipolar disorder, anxiety disorder, schizophrenia, PTSD
- Missing limbs or partially missing limbs
- Mobility impairment, benefiting from the use of a wheelchair, scooter, walker, leg brace(s) and/or other supports
- Nervous system condition, for example, migraine headaches, Parkinson's disease, multiple sclerosis (MS)
- Neurodivergence, for example, attention-deficit/hyperactivity disorder (ADHD), autism spectrum disorder, dyslexia, dyspraxia, other learning disabilities
- Partial or complete paralysis (any cause)
- Pulmonary or respiratory conditions, for example, tuberculosis, asthma, emphysema
- Short stature (dwarfism)
- Traumatic brain injury

**Please check one of the boxes below:**

Yes, I have a disability.  
 I have had a disability in the past.  
 No, I do not have a disability and have not had one in the past.  
 I do not want to answer

**If you have declared a current disability, please answer the questions below:**

Have you received reasonable accommodations in the past to help you be successful in work or school?  
 No  Yes: (please specify) \_\_\_\_\_

If you haven't received accommodation in the past, is there any accommodations that would help you in the workplace going forward? (For ideas on potential accommodations, check out the [Job Accommodation Network](http://www.dol.gov/ofccp))  
 No  Yes: (please specify) \_\_\_\_\_

The Occupational Accommodation Specialist is here to assist you with the accommodation process. Would you like to be contacted by the Occupational Accommodation Specialist?  Yes  No

**PUBLIC BURDEN STATEMENT:** According to the Paperwork Reduction Act of 1995 no persons are required to respond to a collection of information unless such collection displays a valid OMB control number. This survey should take about 5 minutes to complete.

# Direct Deposit Authorization Form



- May use up to 3 accounts, but must have set amounts with the remainder into 1 account
- Changes can be made at any time via ESS or by submitting a new form
- May terminate through ESS or fill out a Direct Deposit Termination paper form
- In ESS you do not need to list previous account information
  - **Paper Form:** You will list previous account information for termination of Direct Deposit
- Fill out account information
  - A voided check is not required if you know your account and routing numbers
- Sign, date, and provide your email address at the bottom!**

# Direct Deposit Authorization Form



## City of Madison Direct Deposit Authorization Agreement

I hereby authorize the City of Madison to initiate credit entries and to initiate, if necessary, debit entries and adjustments for any credit entries in error to my account(s) indicated below and the financial institution(s) named below to credit and debit the same entries to such account(s). If this is changing banking information, please provide the previous account information.

<b>PREVIOUS FINANCIAL INSTITUTION 1:</b>	_____	<b>NEW FINANCIAL INSTITUTION 1:</b>	_____
<b>PREVIOUS ROUTING NUMBER 1:</b>	_____	<b>NEW ROUTING NUMBER 1:</b>	_____
<b>PREVIOUS ACCOUNT NUMBER 1:</b>	_____	<b>NEW ACCOUNT NUMBER 1:</b>	_____
AMOUNT 1:	Net Check	NET CHECKING:	<input type="checkbox"/> SAVINGS <input type="checkbox"/>

<b>PREVIOUS FINANCIAL INSTITUTION 2:</b>	_____	<b>NEW FINANCIAL INSTITUTION 2:</b>	_____
<b>PREVIOUS ROUTING NUMBER 2:</b>	_____	<b>NEW ROUTING NUMBER 2:</b>	_____
<b>PREVIOUS ACCOUNT NUMBER 2:</b>	_____	<b>NEW ACCOUNT NUMBER 2:</b>	_____
AMOUNT 2:	\$ _____	AMOUNT 2: \$ _____	CHECKING <input type="checkbox"/> SAVINGS <input type="checkbox"/>

<b>PREVIOUS FINANCIAL INSTITUTION 3:</b>	_____	<b>NEW FINANCIAL INSTITUTION 3:</b>	_____
<b>PREVIOUS ROUTING NUMBER 3:</b>	_____	<b>NEW ROUTING NUMBER 3:</b>	_____
<b>PREVIOUS ACCOUNT NUMBER 3:</b>	_____	<b>NEW ACCOUNT NUMBER 3:</b>	_____
AMOUNT 3:	\$ _____	AMOUNT 3: \$ _____	CHECKING <input type="checkbox"/> SAVINGS <input type="checkbox"/>

This authority is to remain in full force and effect until the City of Madison Payroll Office has received written notification from me on its termination in such time and in such manner as to afford the City of Madison a reasonable time to act on it. I understand that, due to circumstances that are beyond the City's control, there may be instances that may delay this deposit.

MUNIS EMPLOYEE NUMBER REQUIRED:	_____	NAME:	_____
<b>PREVIOUS EMAIL:</b>	_____	<b>NEW EMAIL:*</b>	_____
SIGNATURE:	_____	DATE:	_____

\*As a participant in Direct Deposit, you will no longer receive a printed check. You will receive an electronic Direct Deposit advice via the email address you provide.

Joe Smith		1234
1234 Anystreet Court		
Anycity, AA 12345		
Pay to the order of _____		
_____ Dollars		
Bank Anywhere		
123456789	123456789123	1234
Routing No.	Account No.	Check No.



# Pay and Leave Benefits

# Getting Paid!!!

- ❑ Paychecks are issued every two weeks
- ❑ Shaded dates on the Payroll Calendar are paydays
- ❑ **Step increases** after 6, 18, 30, and 42 months
  - Salary schedules found online at:  
<http://www.cityofmadison.com/finance/salarySchedule/>
- ❑ **Longevity increases** begin in your 5<sup>th</sup> year
  - Longevity pay schedule found in the Employee Benefits Handbook



# Sick Leave

- **Paid Sick Leave**

- Earn 0.5 day of sick leave per pay period (13 days/year)
- Accrues to a 150-day carryover limit; balances over 150 days may cash out at the end of the year
  - Please see your [Handbook/contract](#) (where applicable) for details
- You must be in paid status for at least 60% of a given pay period to earn sick leave that pay period
- Can be used for the illness or injury of the employee or an eligible family member
- Department rules for reporting absences apply

# Floating Holidays

- **Floating Holidays**

- 3.5 days per year (Teamsters receive 5 days after one year of service; none in the first year)
- Can be used during probation (unlike vacation)
- Typically, you are not allowed to carry these over – the only exception is if your start date is on or after November 1
  - Some contracts may allow payout
- Department rules apply to use of leave
- If you have questions about sick leave or floating holidays, please refer to your [Handbook](#) and/or [labor contract](#) (if applicable).

# Vacation

- **Paid Vacation Leave**

- Most employees begin with 10 days per year
  - Prorated for part-time employees
- Earn additional days every few years
  - See vacation schedule in [Employee Benefits Handbook](#)
- Some time can be used upon successful completion of the 3-month onboarding report – ask your supervisor about this when you do your 3-month report!
- Department rules apply to use of leave



# Holidays and Paid Leave

- **Paid City Holidays**

- New Year's Day, Martin Luther King Jr. Day, Memorial Day, Juneteenth, Independence Day, Labor Day, Thanksgiving, Christmas
- Sunday holidays celebrated Monday
- Saturday holidays results in an extra vacation day for the year (can be used after the holiday for which it is earned)

- **City Paid Leave Days**

- Ho-Chunk Day (day after Thanksgiving)
- Christmas Eve
- New Year's Eve

# Paid Parental Leave (PPL)

- 6 weeks paid leave to care for and bond with a newborn or newly adopted child, as outlined in the PPL [APM](#) and [Policy](#)
- Must be employed by the City for at least 12 months to be eligible for full PPL
  - Partial/prorated PPL is possible after at least 3 months of employment!
- Not granted automatically – an application is required
- Questions about PPL, including any questions about the application process, should be directed to the Leave and Benefits Assistant at [FMLA@cityofmadison.com](mailto:FMLA@cityofmadison.com)



# Insurance and Other Benefits

# Returning Completed Forms



- HR must be **in receipt** of the following Benefit Enrollment Forms **within 30 calendar days** of your first workday in your new position:
  - Health Insurance
  - Dental Insurance
  - Vision Insurance
  - Life Insurance
  - Wage Insurance (aka Short-/Long-Term Disability Insurance, Income Continuation Insurance)
  - Flex Spending
- Benefit forms must be **received in** the Human Resources Department by the deadline. **Failure to submit forms timely will result in waiting periods and/or underwriting.**

# Health Insurance

- The City participates in the Group Health Insurance Program (GHIP) through the Department of Employee Trust Funds (ETF). Our Program Option (PO) is **PO 14 – Local Deductible Without Dental**.
- PO 14 has **uniform benefits**. This means that deductibles, prescription coverage, copays, etc. are all the same across health plans. The **primary differences** between health plan options are 1) service area(s), 2) covered providers, and 3) monthly premiums.
  - The **ETF Decision Guide** provides information on health benefit coverage and includes a summary of uniform benefits on pages 4 and 5.
  - The **most commonly-selected** health plans are listed on the ratesheet in your orientation bag. All health plan options are listed in the Decision Guide and on page 3 of the health form.



# Health Insurance

- Employees can sign up for **any** of the ETF health plan options. Only three of the HMO options have coverage in Dane County. These are:
  - Dean Health Plan by Medica
  - GHC-SCW Dane Choice
  - Quartz-UW Health
- All health plans have the same deductibles and the same two coverage levels (Single or Family).
  - **Single deductible:** \$500
  - **Family deductible:** \$1,000
- Out-of-network emergency/urgent care are covered by all plans **as long as** the health plan/primary care provider is contacted **within 24 hours** following the visit.



## 2026 Insurance Benefits Decision Guide

Local Deductible Plan Insurance  
for Employees, Retirees,  
and COBRA Continuant

ET-2158 (10/2/2025)  
P04, P014



# Health Insurance

- Once you are enrolled in health insurance, coverage continues with your chosen health plan **automatically** year-to-year unless you request to cancel (or change plans) either 1) during Open Enrollment or 2) within the deadline for an eligible qualifying event.
  - **Qualifying events:** Midyear enrollment, change(s), or cancellation all require an eligible qualifying event. Deadlines apply for all qualifying events (usually 30 calendar days), and documentation is required.
  - **Open Enrollment:** Each fall, there is an annual Open Enrollment period for enrollment, change(s), or cancellation without a qualifying event.
    - Open Enrollment changes are effective January 1<sup>st</sup> of the upcoming year.

# Prescription Pharmacy Manager

- The Prescription Pharmacy Manager for all health plans is **Navitus**.
  - Navitus is a third-party administrator of your prescription drug program, which negotiates rebates and discounts on behalf of the City's Group Health Insurance Program
  - The Navitus member card is different from your health plan membership card
- The pharmacy benefit includes co-payments for most prescriptions
  - Based on a formulary established by a committee of physicians and pharmacists and revised each year
  - Includes four levels of co-payments:
    - Level 1: \$5
    - Level 2: 20% of Navitus negotiated cost (\$50 max per fill)
    - Level 3: 40% of Navitus negotiated cost (\$150 max per fill)
    - Level 4: \$50 Copay (must be filled at Lumicera or UW specialty pharmacies)
  - **More information can be found on page 5 of the Decision Guide**



# New system announcement!

- ETF is in the process of transitioning to a new (and improved!) online health insurance system! This system is set to go live on **July 1<sup>st</sup>**. After July 1<sup>st</sup>, all health insurance enrollments, changes, and cancellations will be made **via ETF's My Insurance Benefits portal** online.
- **Good to know:**
  - There is an ongoing health insurance **processing freeze** for employers through mid-June. This **does not impact** deadlines to turn in paperwork to HR.
  - To access My Insurance Benefits, **you will need a MyWisconsin ID**. If you do not already have one, we'd recommend setting it up before July!
  - Starting in July, health premiums will shift to **month-of** billing. If you elect to enroll in City health insurance, you will see your July health premium deducted **on the first paycheck in July**.



# Health Insurance Application



## Health Insurance Application/Change

Wisconsin Department of Employee Trust Funds  
PO Box 7931  
Madison WI 53707-7931  
1-877-533-5020 (toll free)  
Fax 608-267-4549  
etf.wi.gov

There are certain times throughout the year when you may enroll in health insurance or change your coverage. Visit [etf.wi.gov/benefits-by-employer](http://etf.wi.gov/benefits-by-employer) to learn more about choices available to you and see how to enroll. **Return this completed form to your employer. Print clearly.** Please read the terms and conditions on page 6. Sign on page 4. Your health insurance deductions will be taken pre-tax unless you request they be taken post-tax. Contact your employer to make this change or submit the *Automatic Premium Conversion Waiver/Revocation of Waiver* (ET-2340) to your employer.

<b>1. Applicant Information</b> <i>Only the subscriber applying for coverage/making a change should complete this form.</i>										
Check here if your name, phone, address, email, or marital status has changed: <input type="checkbox"/> List updated information below										
Name First		M.I.	Last		Former/Maiden (if applicable)					
ETF ID	SSN	Telephone, including area code			Email					
Mailing address (Street)			City		State	ZIP code	Country			
Birth date		Sex <input type="checkbox"/> Male <input type="checkbox"/> Female		Primary care physician or clinic <i>Health plan may also ask</i>						
Check your marital status:										
<input type="checkbox"/> Single <i>(no change date required)</i>		<input type="checkbox"/> Married		<input type="checkbox"/> Divorced		<input type="checkbox"/> Widowed				
Date: (MM/DD/YYYY)		Date: (MM/DD/YYYY)		Date: (MM/DD/YYYY)		Date: (MM/DD/YYYY)				
Please check which applies to you (this determines your eligibility)										
<input type="checkbox"/> Employee		<input type="checkbox"/> Graduate assistant		<input type="checkbox"/> COBRA recipient		<input type="checkbox"/> Surviving dependent				
<b>2. Spouse Information</b> <i>(Only complete if you are on a family plan; not required for single coverage)</i>										
Name First		M.I.	Last		Former/Maiden		SSN			
Birth date		Sex <input type="checkbox"/> Male <input type="checkbox"/> Female		Primary care physician or clinic <i>Health plan may also ask</i>						
Check here if your spouse's information has changed: <input type="checkbox"/>										
<b>3. Dependent Information</b> <i>(Only complete if you are on a family plan; this does not include spouse)</i>										
Name <i>You may attach additional pages if more space is needed</i>										
First		M.I.	Last		SSN	Birth date	Sex (M/F)	Relationship (child, stepchild, legal ward, child of minor dependent)	Disabled (Y/N)	Primary care physician or clinic <i>Health plan may also ask</i>
Is any dependent listed here your or your spouse's grandchild? <input type="checkbox"/> Yes <input type="checkbox"/> No										
If yes, name of parent: _____										



## Page 1

- **Section 1:**
  - Fill in all boxes, including date (if applicable) for marital status
  - Make sure you include your Social Security Number (ETF ID may not have been assigned yet)
- **Section 2:**
  - Complete if applicable (only required if spouse will be covered) – **documentation required if covering spouse**
- **Section 3:**
  - Complete if applicable (only required if child(ren), stepchild(ren), or permanent legal ward(s) will be covered) – **documentation required if covering any dependent(s)**
  - Ensure all details are included in Dependent Information (e.g. legal name, Social Security Number, date of birth, sex, relationship, etc.)



# Health Insurance Application



## Page 2

Name: \_\_\_\_\_ ETF ID: \_\_\_\_\_

**4. Are you eligible to enroll or make a change?**  
*You can modify your benefits during the annual IYC open enrollment, your initial hire period and in response to an eligible life event change. Eligible life changes are listed below.*

**Reason for Application:** Select a reason for enrolling or changing your coverage or health plan:

Annual health benefits open enrollment (coverage effect January 1).  
 New hire (Choose date your coverage will be effective, see below).  
 Rehired annuitant.  
 Eligible life event change (select change below). Life event change date: \_\_\_\_\_  
 Eligible move to a new service area (may only change health plan). Move date: \_\_\_\_\_

**New hires or employees returning from leave (lapsed coverage) only: Choose your coverage to be effective:**

When my employer contributes to my premium.  
 As soon as possible (you will pay the entire monthly premium until you are eligible for your employer contribution).  
 I choose to decline/waive coverage (to decline health insurance and elect the opt-out incentive, go to section 12).  
 I choose to decline/waive coverage because I have other health insurance coverage (go to section 13 and sign).

Eligible life event changes, which allow you to make a change outside of the annual health benefits open enrollment (or your initial hire period), include birth/adoption, marriage and divorce. Visit [etf.wi.gov/insurance/life-events-guide](http://etf.wi.gov/insurance/life-events-guide) for more.

**Select one reason to add coverage/dependent or remove dependent(s):**

<b>Add coverage/dependent(s)</b> (complete section 3)	<b>Remove dependent(s)</b> (complete section 8)
<input type="checkbox"/> Marriage*	<input type="checkbox"/> Divorce*
<input type="checkbox"/> Transfer to a new state agency (state only) Former agency name: _____	<input type="checkbox"/> Death of dependent
<input type="checkbox"/> Birth or adoption*	<input type="checkbox"/> Legal ward/guardianship end*
<input type="checkbox"/> LTE new hire (state only)	<input type="checkbox"/> Disabled dependent disability end or support/maintenance less than 50%
<input type="checkbox"/> Enroll in COBRA (Continuation-Conversion Notice (ET-2311) required)	<input type="checkbox"/> Grandchild's parent age 18
<input type="checkbox"/> National Medical Support Notice*	<input type="checkbox"/> Adult dependent eligible for other coverage*
<input type="checkbox"/> Spouse-to-spouse transfer at retirement	<input type="checkbox"/> Other: _____
<input type="checkbox"/> Loss of employer contributions or loss of other coverage*	
<input type="checkbox"/> Paternity acknowledgment*	
<input type="checkbox"/> Legal ward/guardianship*	
<input type="checkbox"/> Disabled dependent, age 26+*	
<input type="checkbox"/> Dependent not on initial enrollment (excludes adult dependents)	
<input type="checkbox"/> Other: _____	

*\*You may be required to provide supporting documentation. See [etf.wi.gov/life-change-event-documentation](http://etf.wi.gov/life-change-event-documentation)*

**5. Enroll in a Plan Design**  
*Compare factors like monthly payments, coverage levels, out-of-network benefits, and provider availability. See your health benefits materials or your employer for specific options available to you, and descriptions of each plan design. If you are not changing the options below, you do not need to complete this section.*

**Make your plan (chosen on next page) a High Deductible Health Plan (HDHP)?**  Yes  No

**Individual or family coverage?**  Individual  Family

**With or without Uniform Dental?**  With dental  Without dental

If you choose with dental, your dental plan will be Delta Dental.  
 State employees: If you elect HDHP, you must also enroll in the state-sponsored health savings account (HSA). You are not eligible for an HDHP if you have other coverage. You may enroll in an HDHP if your dependents have other coverage.  
 Local Wisconsin Public Employer (WPE) employees: You can only enroll in the plan designs your employer offers, including dental. Check with your employer.

- **Section 4:**

- Check New Hire

- Check one of the following:

- When my employer contributes to my premium (first box)**

- As soon as possible (second box) – coverage starts on the next 1<sup>st</sup> of the month; employee must pay total premium (employee + employer portions) for that month's coverage**

- I choose to decline (fourth box)**

- **Section 5:**

- Indicate Individual or Family

**! The City's Health insurance program does not include HDHP or Dental, so those boxes do not apply**

- If you want to enroll in dental, make sure you submit the separate dental application!

# Health Insurance Application



## Page 3

- **Section 6:**
  - Check the box of the health plan that you selected
- **Section 7:**
  - Fill out all of Section 7 if applicable; skip if not applicable
- **Section 8-9:**
  - Skip these Sections

Name: \_\_\_\_\_ ETF Member ID: \_\_\_\_\_

**6. Select Your Health Plan**  
*All health plans provide the same in-network benefits. When choosing a plan, consider where you live or work, health plan quality ratings and the monthly premium. See your insurance benefits materials for your options. Health plan provider directories are available online.*

<input type="checkbox"/> Access Plan	<input type="checkbox"/> Medical Associates Health Plans
<input type="checkbox"/> Aspirus Health Plan	<input type="checkbox"/> MercyCare Health Plans
<input type="checkbox"/> CareSource with GHC of Eau Claire	<input type="checkbox"/> Network Health
<input type="checkbox"/> Dean Health Plan by Medica	<input type="checkbox"/> Prevea360 East
<input type="checkbox"/> Medica West and Mayo Clinic Health System	<input type="checkbox"/> Quartz Central
<input type="checkbox"/> GHC of Eau Claire Greater Wisconsin	<input type="checkbox"/> Quartz UW Health
<input type="checkbox"/> GHC of Eau Claire River Region	<input type="checkbox"/> Quartz West
<input type="checkbox"/> GHC of South Central Wisconsin Dane Choice	<input type="checkbox"/> Robin with HealthPartners
<input type="checkbox"/> GHC of South Central Wisconsin Neighbors	<input type="checkbox"/> Security Health Plan
<input type="checkbox"/> HealthPartners Health Plan Southeast	<input type="checkbox"/> State Maintenance Plan (SMP)
<input type="checkbox"/> HealthPartners Health Plan West	

**7. Complete if you or any of your Dependents are Covered by Medicare**  
*Required for all persons covered by Medicare, including yourself. Eligibility reasons include age, disability or end-stage renal disease (ESRD).*

Name (First, M.I., Last)	Medicare number (see your Medicare ID card)	Part A effective date	Part B effective date	Why eligible?
				<input type="checkbox"/> Age <input type="checkbox"/> Disability <input type="checkbox"/> ESRD
				<input type="checkbox"/> Age <input type="checkbox"/> Disability <input type="checkbox"/> ESRD
				<input type="checkbox"/> Age <input type="checkbox"/> Disability <input type="checkbox"/> ESRD

**8. Remove a Spouse or Dependent(s)**

Name of person(s) you are removing (First, M.I., Last)	Birth date	Address (if different than your address on page 1)

**9. Complete if you are Changing from Family to Individual Coverage**  
*If your employee monthly premium share is pre-tax, IRC Section 125 restricts midyear changes to your coverage. For more information on IRC Section 125 limitations, visit [www.irs.gov](http://www.irs.gov).*

**My employee-required monthly premium contribution is deducted (check one):**

Pre-tax and my employee premium contribution has increased significantly

Pre-tax eligible life event change  
 What was the event? \_\_\_\_\_

Pre-tax change to individual during annual open enrollment period (January 1)

Post-tax (midyear changes to coverage level can be made at any time)  
 Event date: \_\_\_\_\_



# Health Insurance Application



## 12. State Employees Only: Decline Health Insurance & Elect the Opt-Out Incentive

Are you electing to receive the opt-out incentive for 2023?  Yes  No

*If yes, you certify you are eligible for the opt-out stipend and are not currently, nor will be this program year, a covered dependent under the State of Wisconsin Group Health Insurance Program, and that you did not decline or waive coverage in 2015.*

## 13. Signature Required *If not signed, ETF cannot accept your application*

By signing this application, I apply for the insurance under the indicated health insurance contract made available to me through the State of Wisconsin and I have read and agreed to the *Terms and Conditions* (see page 6). A copy of this application is considered as valid as the original. In addition, to the best of my knowledge, all statements and answers in this application are complete and true. Providing false information is punishable under Wis. Stat. § 943.395. Additional documentation may be required by ETF at any time to verify eligibility.

Signature	Date (MM/DD/YYYY)

This form must be turned in directly to Human Resources within **30 calendar days** from date of hire even if you are waiving coverage!

## Page 4

- **Section 10:** skip
- **Section 11:**
  - Complete this Section if you have additional coverage that will **overlap** with the insurance provided by the City; otherwise, check “no”
- **Section 12:** skip, does not apply to City employees
- **Section 13:**
  - Sign and date



# Dental Insurance

- **Provider: Delta Dental**

- Available to all permanent City Employees with no waiting period **after** the effective date
- Preferred Provider Organization (PPO)/Premier Plan – See Delta’s website for PPO and Premier Network Providers
  - Three levels of benefits available
  - Highest level of benefits if you choose a Preferred (PPO) network Dentist
  - Second highest level of benefits if you choose a Premier network Dentist
  - Out of network Dentists result in lowest level of benefits
- Premium taken out of second biweekly paycheck of the month (for the **following** month’s coverage)



## 2026 Monthly Delta Dental Premiums

Employee Only: \$38.25 (Single)

Employee + Spouse: \$87.50

Employee + Child(ren): \$88.22

Employee + Spouse + Child(ren): \$132.82 (Family)

# Dental Insurance Application



**DELTA DENTAL** Delta Dental of Wisconsin  
**Enrollment/Change/Waiver Form - Dental**  
 PLEASE NOTE THAT COMPLETING THIS FORM DOES NOT GUARANTEE COVERAGE.

**EMPLOYER USE ONLY**  
 GROUP NUMBER 502 EFFECTIVE DATE

**COMPLETE THIS SECTION IF YOU ARE ACCEPTING, CHANGING, OR TERMINATING COVERAGE**

EMPLOYEE LAST NAME FIRST M.I. SSN OR EMPLOYER ASSIGNED ID DATE OF BIRTH MO DAY YR SEX F M  
 HOME ADDRESS - STREET CITY STATE ZIP  
 EMPLOYER NAME EMPLOYER LOCATION CITY STATE DATE OF HIRE MO DAY YR  
 City of Madison Madison WI

**LIST ALL ELIGIBLE FAMILY MEMBERS TO BE COVERED**

SPOUSE LAST NAME (IF DIFFERENT)	FIRST	M.I.	SSN OR EMPLOYER ASSIGNED ID	RELATIONSHIP		DATE OF BIRTH	MO	DAY	YR
				SON	DAU.				
				<input type="checkbox"/>	<input type="checkbox"/>				
				<input type="checkbox"/>	<input type="checkbox"/>				
				<input type="checkbox"/>	<input type="checkbox"/>				
				<input type="checkbox"/>	<input type="checkbox"/>				
				<input type="checkbox"/>	<input type="checkbox"/>				
				<input type="checkbox"/>	<input type="checkbox"/>				

**REASON FOR SUBMITTING THIS FORM**  
 NEW ENROLLEE  REHIRE (Date: \_\_\_\_\_) Date Occurred \_\_\_\_\_  
 IF THIS IS FOR CHANGE, WHAT IS THE REASON?  
 Birth/Adoption (Name: \_\_\_\_\_) Date Occurred \_\_\_\_\_  
 Marriage/  Divorce  
 Add/  Drop Dependent (Name: \_\_\_\_\_)  
 Termination of Benefits (Reason: \_\_\_\_\_)  
 Loss of Dental Benefits  
 Name Change (Former Name: \_\_\_\_\_)  
 Address Change (\_\_\_\_\_)  
 Group Transfer (From \_\_\_\_\_ To \_\_\_\_\_)  
 COBRA Application

**COVERAGE TYPE**  
 WHAT TYPE OF COVERAGE ARE YOU APPLYING FOR?  
 Employee Only  Employee & Spouse  
 Employee & Child(ren)  Entire Family  
 YOUR MARITAL STATUS  Single  Married  
 If you are not accepting coverage for your spouse or dependents, are they covered by another dental plan?  Yes  No  
 ACCEPT COVERAGE  
 X \_\_\_\_\_ Date \_\_\_\_\_  
 Signature is Required

**COMPLETE THIS SECTION ONLY IF YOU ARE WAIVING COVERAGE**

EMPLOYEE LAST NAME FIRST M.I. SSN OR EMPLOYER ASSIGNED ID PLEASE CHECK ONE:  
 I have coverage through my spouse  
 I have other dental coverage  
 I do not have other dental coverage  
 WAIVE COVERAGE X \_\_\_\_\_ Date \_\_\_\_\_  
 Signature is Required

**Acceptance of Coverage**  
 I accept the insurance provided by my employer's group insurance plan. I authorize deductions from my earnings for the required contributions toward the cost of insurance. (This authorization applies only if employee contributions are required.) I understand that by accepting insurance, I am required to remain enrolled as a covered employee and cannot make an elective change in the coverage selected until the next open enrollment period, if there is one provided for in the Master Agreement to Provide Dental Benefits.

**Waiver of Coverage**  
 I understand that if I decide not to apply for coverage, or if I apply only for single coverage even though I am eligible for family coverage, any subsequent application will be subject to the applicable terms and conditions of the Master Agreement to Provide Dental Benefits, which may require additional limitations and waiting periods. I also understand that Delta Dental of Wisconsin, Inc. reserves the right to reject such an application.

F708A-1411

## • Application

- Complete paper application and return to HR within 30 calendar days of date of hire even if you are waiving coverage!
- City group number is 502
- Enrollment only upon hire, in the annual Open Enrollment period, or with a midyear qualifying event
- Dental cannot be terminated mid-year except with an eligible qualifying event
- Deadlines apply to all qualifying events

# Vision Insurance



- **Provider is DeltaVision**

- Available to all permanent City employees with no waiting period **after** the effective date
- City group number is 43429
- Network Benefit/Non-Network Reimbursement – See Delta’s website for Network providers
- Premium taken out of second biweekly paycheck of the month (for the following month’s coverage)

**2026 Monthly DeltaVision Premiums**

Employee Only: \$5.97 (Single)

Employee+Spouse: \$11.94

Employee+Child(ren): \$12.19

Employee+Spouse+Child(ren): \$18.16 (Family)

# Vision Insurance Application



**DELTA DENTAL** Delta Dental of Wisconsin  
**Enrollment/Change/Waiver Form - DeltaVision**  
 PLEASE NOTE THAT COMPLETING THIS FORM DOES NOT GUARANTEE COVERAGE.

**EMPLOYER USE ONLY**  
 GROUP NUMBER 43429 EFFECTIVE DATE \_\_\_\_\_

**COMPLETE THIS SECTION IF YOU ARE ACCEPTING, CHANGING, OR TERMINATING COVERAGE**

EMPLOYEE LAST NAME FIRST M.I. SSN OR EMPLOYER-ASSIGNED ID DATE OF BIRTH (M/D/Y) GENDER F M U  
 HOME ADDRESS - STREET CITY STATE ZIP  
 EMPLOYER NAME EMPLOYER LOCATION CITY STATE DATE OF HIRE (M/D/Y)  
 City of Madison Madison WI \_\_\_\_\_

**LIST ALL ELIGIBLE FAMILY MEMBERS TO BE COVERED**

SPOUSE LAST NAME (IF DIFFERENT)	FIRST	M.I.	SSN OR EMPLOYER-ASSIGNED ID	DATE OF BIRTH (M/D/Y)	GENDER F M U
CHILD/DEPENDENT LAST NAME (IF DIFFERENT)					

**REASON FOR SUBMITTING THIS FORM**  
 NEW ENROLLEE  REHIRE (Date: \_\_\_\_\_)  
 IF THIS IS FOR CHANGE, WHAT IS THE REASON? Date Occurred  
 Birth/Adoption (Name: \_\_\_\_\_)  
 Marriage/ Divorce  
 Add/ Drop Dependent (Name: \_\_\_\_\_)  
 Termination of Benefits (Reason: \_\_\_\_\_)  
 Loss of Vision Benefits  
 Name Change (Former Name: \_\_\_\_\_)  
 Address Change (\_\_\_\_\_)  
 Group Transfer (From \_\_\_\_\_ To \_\_\_\_\_)  
 COBRA Application

**COVERAGE TYPE**  
 WHAT TYPE OF COVERAGE ARE YOU APPLYING FOR?  
 Employee Only  Employee & Spouse  
 Employee & Child(ren)  Entire Family  
 YOUR MARITAL STATUS  Single  Married  
 If you are not accepting coverage for your spouse or dependents, are they covered by another vision plan?  
 Yes  No

**ACCEPT COVERAGE**  
 Signature is Required \_\_\_\_\_ Date \_\_\_\_\_

**COMPLETE THIS SECTION ONLY IF YOU ARE WAIVING COVERAGE**

EMPLOYEE LAST NAME FIRST M.I. SSN OR EMPLOYER-ASSIGNED ID DATE OF BIRTH (M/D/Y) GENDER F M U  
 HOME ADDRESS - STREET CITY STATE ZIP  
 EMPLOYER NAME EMPLOYER LOCATION CITY STATE DATE OF HIRE (M/D/Y)  
 \_\_\_\_\_ \_\_\_\_\_ \_\_\_\_\_ \_\_\_\_\_ \_\_\_\_\_

**WAIVE COVERAGE**  
 Signature is Required \_\_\_\_\_ Date \_\_\_\_\_

**PLEASE CHECK ONE:**  
 I have coverage through my spouse  
 I have other vision coverage  
 I do not have other vision coverage

**Acceptance of Coverage**  
 I accept the insurance provided by my employer's group insurance plan. I authorize deductions from my earnings for the required contributions toward the cost of insurance. (This authorization applies only if employees contributions are required.) I understand that by accepting insurance, I am required to remain enrolled as a covered employee and cannot make an elective change in the coverage selected until the next open enrollment period, if there is one provided for in the Master Agreement to Provide Vision Benefits.

**Waiver of Coverage**  
 I understand that if I decide not to apply for coverage, or if I apply only for single coverage even though I am eligible for family coverage, any subsequent application will be subject to the applicable terms and conditions of the Master Agreement to Provide Vision Benefits, which may require additional limitations and waiting periods. I also understand that Delta Dental of Wisconsin, Inc. reserves the right to reject such an application.

## • Application

- Complete paper application and return to HR **within 30 calendar days** of date of hire even if waiving coverage!
- Enrollment only upon hire, in the annual Open Enrollment period, or with an eligible midyear qualifying event
- Vision insurance cannot be terminated midyear except with a qualifying event
- Deadlines apply to all qualifying events

# Life Insurance



- Provided through The Hartford
- **Employee Coverage** is available in four levels:
  - Basic (highest annual earnings of record rounded up)
  - Basic + 50% Supplemental (Basic x 1.5)
  - Basic + 100% Supplemental (Basic x 2)
  - Basic + 200% Supplemental (Basic x 3)
- The City's coverage is **group term insurance**, meaning coverage for the term of which the premium is paid
- The initial Basic coverage amount is determined by your annual starting pay rounded up to the next highest thousand (if not already an even multiple of \$1,000)

# Life Insurance

- **Dependent coverage** is available in 1-2 units (\$1.75 each):
  - 1 unit: \$10,000 coverage for child(ren), \$10,000 coverage for spouse
  - 2 units: \$15,000 coverage for child(ren), \$20,000 coverage for spouse
- In order to enroll in dependent coverage, you must be enrolled in at least the Basic level of employee coverage.
- Each unit of dependent coverage is an “umbrella” that covers any/all eligible dependent(s), which for dependent coverage purposes includes spouses to age 65 and/or dependent child(ren) to age 26.
  - Because the Hartford prohibits dual/double coverage on the City's plan, unit(s) of dependent coverage only apply to a spouse/child(ren) who do not have their own City life insurance coverage, and eligible child(ren) can only be covered by one set of City dependent coverage unit(s) at a time.

# Life Insurance



- **Enrollment/Changes:**

- After the initial new hire enrollment window, enrollment (and/or increasing coverage) requires either:
  1. An eligible qualifying life event, such as birth/adoption, marriage, or divorce (limitations and deadlines apply), or
  2. Approval via the medical underwriting process
- Life insurance coverage can be reduced or cancelled at any time.

- **Beneficiaries:**

- Can be a person/people, trust(s), or organization(s); you cannot designate animals/pets as beneficiaries.
- Your beneficiary designation is in effect until you actively change it – qualifying events **do not negate** prior designations.

# Life Insurance

- **Life Insurance Premium**

- Based on age and benefit amount; premiums and coverage are recalculated annually each summer
- Inexpensive – increases over time
- Taken from 1<sup>st</sup> paycheck of mo.
- Payments can continue into retirement
- No premium after 70 if working, 65 if retired, and still get 25+ percent of Basic coverage paid!
- **Application must be received in HR within 30 calendar days of date of hire whether enrolling in or waiving coverage**

Age Group	Cost per \$1000 Coverage
Under 25	.05
25-29	.06
30-34	.08
35-39	.09
40-44	.10
45-49	.15
50-54	.23
55-59	.43
60-64	.57
65-69*	.57
Over 69*	Free - basic coverage only

\*Over age 65 rates and coverage apply only if working

# Group Term Life Insurance



City of Madison  
**GROUP TERM LIFE INSURANCE, DEPENDENT LIFE, and  
 ACCIDENTAL DEATH AND DISMEMBERMENT  
 ENROLLMENT/CHANGE FORM**

PAGE 2 of 2

Submit completed form to:  
 City of Madison Human Resources Department  
 215 Martin Luther King Jr Blvd Suite 261, Madison, WI 53703

Check all applicable boxes:

- Initial Enrollment\*   
  Reinstate Coverage   
  Reduce Coverage   
  Remove Dependent Coverage  
 Increase Coverage\*   
  Information Change   
  Beneficiary Change   
  Waive/Cancel Coverage

\* An increase in coverage or enrollment beyond 30 calendar days from date first eligible requires either an eligible qualifying event (deadlines and restrictions apply) or an approved Evidence of Insurability (EOI) Application

<b>SECTION 1: Employee Information and Coverage Elections (COMPLETION OF THIS SECTION IS REQUIRED)</b>		
PRINT NAME (Last, First, Middle Initial)		DATE OF BIRTH (mm/dd/yyyy)
List any Former Name(s) (Last, First, Middle Initial) (Separate multiple former names with a semicolon (;))		
DEPARTMENT NAME	DATE OF PERMANENT HIRE	MUNIS ID # (EMPLOYEE ID #)
<b>SELECT EMPLOYEE COVERAGE:</b> <input type="checkbox"/> BASIC COVERAGE only <input type="checkbox"/> BASIC plus SUPPLEMENTAL COVERAGE: <input type="checkbox"/> PLUS 50% <input type="checkbox"/> PLUS 100% <input type="checkbox"/> PLUS 200%		<b>SELECT DEPENDENT COVERAGE:</b> (units of coverage for employee's spouse and/or child(ren)) <input type="checkbox"/> 1 UNIT or <input type="checkbox"/> 2 UNITS or <input type="checkbox"/> NONE Beneficiary for Dependent Coverage is the Employee
<b>SECTION 2: Beneficiary Designation</b>		
BENEFICIARY DESIGNATION: PRINT (See reverse side for suggested wording)		
Primary: _____		
Secondary: _____		
<b>SECTION 3: Acceptance of Coverage and/or Acknowledgment of Beneficiary Designation</b>		
<input type="checkbox"/> I hereby request the amount of life insurance for which I am eligible and authorize the deduction from my earnings of the amount required to cover my share of the premiums. I reserve the right to revoke this deduction authorization and thereby understand that coverage ceases at any time on written notice. <input type="checkbox"/> Under and subject to the terms of the Group Policy, I hereby revoke any former Designation of Beneficiary by me made, and I now designate my Beneficiary or Beneficiaries as indicated above.		
Signature _____		
Date Signed _____		
<b>SECTION 4: Waive or Cancel Coverage (COMPLETE THIS SECTION ONLY IF WAIVING/CANCELING COVERAGE)</b>		
<input type="checkbox"/> I do <u>not</u> wish to participate in the City of Madison's Group Life Insurance, Dependent Life, and AD&D Plan.		
Signature _____		
Date Signed _____		

## INSTRUCTIONS

1. Complete all sections of the form that are relevant to the enrollment/change that you are making.
2. The Signature of the Insured must be in non-erasable ink. Typed signatures, including DocuSign, are not accepted.
3. If the proposed beneficiary is a married woman, fill in her own given first and middle names, not those of her husband.
4. If you have named more than one beneficiary and have not designated the share for each, the benefits will be paid equally or to the survivor.
5. If your beneficiary is a minor (under age 18 in the State of Wisconsin), benefits will not be released directly to the minor, but instead to the court-appointed guardian of the estate (or property) of the minor. Guardianship of a minor's "person" is not the same as guardianship of a minor's property.

## EXAMPLE WORDING OF TYPICAL BENEFICIARY DESIGNATIONS

1. **One beneficiary only:** Mary E. Doe, Wife. (A married woman should not be designated as Mrs. John Doe)
2. **Two beneficiaries (equal amounts):** John H. Doe, Father, and Mary E. Doe, Mother, equally or the survivor
3. **Three or more beneficiaries (equal amounts):** John H. Doe, Father, Mary E. Doe, Mother, and Stella Doe, Sister, equally or the survivor(s).
4. **Unequal amounts:** 75% to John H. Doe, Husband, 25% to Elizabeth M. Jones, Mother.
5. **Primary and Contingent beneficiaries:** John H. Doe, Husband, if living; otherwise to Jeff W. Doe, Son, and Jane M. Smith, Daughter, equally or the survivor.
6. **Partnership beneficiary:** Smith, Jones, and Brown, a partnership consisting of John A. Smith, Elizabeth M. Jones, and Henry D. Brown.
7. **Common Disaster Clause:** John H. Doe, Husband, if living on the 15<sup>th</sup> day after the death of the insured; otherwise to Jeff W. Doe, Son, and Jane M. Smith, Daughter, equally or the survivor.
8. **Estate of the Insured** (certified estate papers issued by the Court are required)
9. **Trust** (a Charitable, Living, or Testamentary trust may be named. Employees are strongly encouraged to seek professional advice to correctly provide this option.)

For additional information on this plan, visit <https://www.cityofmadison.com/human-resources/benefits/life-insurance>

# Income Continuation (Wage, Disability) Insurance

- **Also called Wage Insurance, Short/Long-Term Disability Insurance**
  - Provided through The Hartford
  - Insures employees up to 65% of regular salary (\$1,875 maximum weekly benefit)
  - Benefits cover non-work-related injury and illness
  - Provides short (3 years) and long-term benefits (up to retirement)
  - Must exhaust all available sick leave before payments start
- **Enrollment**
  - Coverage begins on date of enrollment
  - After the initial enrollment window ends, enrollment in wage insurance is only possible through medical underwriting approval. **There is no other opportunity to enroll without underwriting.**
  - **Application must be received in HR within 30 calendar days of date of hire whether enrolling in or waiving coverage**

# Income Continuation (Wage, Disability) Insurance

- **Wage Insurance Premiums:**

- Taken out of the **second check of each month**
- The percent of the premium paid by the employee vs. City is based on a combination of bi-weekly wages, accumulated sick leave, and sick leave used/accrued per annual tracking period (Sept-Sept), and is adjusted annually
- 100% of the premium is paid by the City if accumulated sick leave is over 100 or 120 days, depending on comp group
- An employee must be employed for 6 months as of the annual recalculation in order to be eligible for their premium to change. If employment begins after April, the first recalculation will be October of the following year.

Sick Leave Used	Sick Leave Accrued	Employee Pays
0-3.00 days	10.00-13.00 days	0%
3.01-4.00 days	9.00-9.99 days	20%
4.01-5.00 days	8.00-8.99 days	40%
5.01-6.00 days	7.00-7.99 days	60%
6.01-7.00 days	6.00-6.99 days	80%
7.01+ days	0-5.99 days	100%

# Income Continuation (Wage, Disability) Insurance



City of Madison  
SHORT TERM & LONG TERM DISABILITY INSURANCE  
(WAGE INSURANCE) ENROLLMENT/CHANGE FORM

Submit completed form to:  
City of Madison Human Resources Department  
215 Martin Luther King Jr Blvd Suite 261, Madison, WI 53703

Check all applicable boxes:

Initial Enrollment\*  Beneficiary Designation Change  Name Change  Waive/Cancel Coverage

\* Enrollment beyond 30 calendar days from date first eligible requires an approved Evidence of Insurability (EOI) Application

<b>SECTION 1: Employee Information (COMPLETION OF THIS SECTION IS REQUIRED)</b>		
PRINT NAME (Last, First, Middle Initial)		DATE OF BIRTH (mm/dd/yyyy)
List any Former Name(s) (Last, First, Middle Initial) (Separate multiple former names with a semicolon (;))		
DEPARTMENT NAME	DATE OF PERMANENT HIRE	MUNIS ID #
<b>SECTION 2: Beneficiary Designation</b>		
BENEFICIARY DESIGNATION (See reverse side for suggested wording)		
Primary: _____		
Secondary: _____		
<b>SECTION 3: Acceptance of Coverage and/or Acknowledgment of Beneficiary Designation</b>		
<input type="checkbox"/> I hereby request the amount(s) and form(s) of insurance coverage for which I am or may become eligible under the insurance policy or policies. I authorize the deduction from my earnings of the amount required to cover my share of the premiums, if any. I reserve the right to revoke this deduction authorization at any time on written notice.		
<input type="checkbox"/> Under and subject to the terms of the Group Policy, I hereby annul and revoke any former Designation of Beneficiary by me made, and I now designate my Beneficiary or Beneficiaries as indicated above.		
Signature _____		
Date Signed _____		
<b>SECTION 4: Waive or Cancel Coverage (COMPLETE THIS SECTION ONLY IF WAIVING/CANCELING COVERAGE)</b>		
<input type="checkbox"/> I do <u>not</u> wish to participate in the City of Madison's Group Short Term & Long Term Disability Insurance Plan.		
Signature _____		
Date Signed _____		

FOR EMPLOYER USE ONLY  
EFFECTIVE DATE OF COVERAGE (mm/dd/yyyy)

## INSTRUCTIONS

1. Complete all sections of the form that are relevant to the enrollment/change that you are making.
2. The Signature of the Insured must be in non-erasable ink. Typed signatures, including DocuSign, are not accepted.
3. If the proposed beneficiary is a married woman, fill in her own given first and middle names, not those of her husband.
4. If you have named more than one beneficiary and have not designated the share for each, the benefits will be paid equally or to the survivor.
5. If your beneficiary is a minor, benefits will not be released directly to the minor child but instead to the court-appointed guardian of the estate (or property) of the minor child. Guardianship of a minor child's "person" is not the same as guardianship of a minor child's property.

## EXAMPLE WORDING OF TYPICAL BENEFICIARY DESIGNATIONS

1. **One beneficiary only:** Mary E. Doe, Wife. (A married woman should not be designated as Mrs. John Doe)
2. **Two beneficiaries (equal amounts):** John H. Doe, Father; and Mary E. Doe, Mother, equally or the survivor
3. **Three or more beneficiaries (equal amounts):** John H. Doe, Father; Mary E. Doe, Mother; and Stella Doe, Sister, equally or the survivor(s).
4. **Unequal amounts:** 75% to John H. Doe, Husband; 25% to Elizabeth M. Jones, Mother.
5. **Primary and Contingent beneficiaries:** John H. Doe, Husband, if living; otherwise to Jeff W. Doe, Son; and Jane M. Smith, Daughter, equally or the survivor.
6. **Partnership beneficiary:** Smith, Jones, and Brown, a partnership consisting of John A. Smith, Elizabeth M. Jones, and Henry D. Brown.
7. **Common Disaster Clause:** John H. Doe, Husband, if living on the 15<sup>th</sup> day after the death of the insured; otherwise to Jeff W. Doe, Son; and Jane M. Smith, Daughter, equally or the survivor.
8. **Estate of the Insured** (certified estate papers issued by the Court are required)
9. **Trust** (a Charitable, Living, or Testamentary trust may be named. Employees are strongly encouraged to seek professional advice to correctly provide this option.)

For additional information on this plan, visit <https://www.cityofmadison.com/human-resources/benefits/wage-insurance>

# Flex Spending



- Flexible Spending Accounts (FSA) allow you to defer funds from your paycheck pretax for use towards eligible expenses. City FSA is administered by Total Administrative Services Corporation (TASC).
- Annual Enrollment is required **each year** if participating.
  - If you enroll, your contributions will be deducted in equal amounts from each paycheck **pretax** throughout the Plan Year.
- Two types of accounts are available: Healthcare Flexible Spending Accounts (also known as Medical FSA) and Dependent Care Flexible Spending Accounts (DCAP).

**Healthcare Flexible Spending Account (Medical FSA):** \$3,400 maximum allowed annually (2026)

**Dependent Care Flexible Spending Account (DCAP):**

- \$7,500 maximum allowed annually per household (regardless of number of dependents)
- \$3,750 maximum allowed annually for married individuals filing separately



# Flex Spending

- **Healthcare Flex Spending:**

- You will have access to your **total** Healthcare FSA annual contribution at the start of the Plan Year (or once your election is processed, if enrolling as a new hire).
- Healthcare Flex Spending funds cannot be used toward employee health, dental, or vision premium contributions, but can be used for the annual deductibles.
- If your spouse has a Health Savings Account (HSA) through their employer, you are **ineligible** to participate in Healthcare Flex Spending. (You can still participate in DCAP if you have eligible dependents.)

- **Dependent Care (DCAP):**

- Dependent Care (DCAP) FSA funds are available **up to the current account balance** only.
- DCAP is **not** for dependent or spouse medical expenses – it is only for the cost of care for eligible dependent(s) that enables you to work, such as daycare expenses.
- The TASC card can only be used for Healthcare FSA expenses; DCAP claims must be submitted for reimbursement.

# Flex Spending

- **Process:**

- Your TASC Card can be used to make eligible purchases directly from vendors for Healthcare FSA
- Requests for reimbursement for Healthcare FSA or DCAP can be made via the TASC Mobile App, online, or paper form (fax or mail)
- Reimbursements can be directly deposited in your checking/savings account
- Funds **cannot** be transferred between Healthcare FSA and DCAP accounts
- Eligible claims must be incurred during the Plan Year (with grace period through March 15<sup>th</sup>) and submitted by March 31<sup>st</sup>
- For more information, including information on eligible purchases, go to [www.tasconline.com](http://www.tasconline.com)

# Flex Spending Enrollment Form



## EMPLOYEE ENROLLMENT FORM Flexible Spending Account (FSA) City of Madison

Instructions: Please sign, date, and complete each line on the enrollment form. Enter zero (0) where no amount is being elected. Return the completed and signed form to your employer for processing.

For Employer to complete where applicable:

Client/Company Name:	City of Madison	TASC ID:	4422-0923-3494
Participant Plan Effective Date:		First Payroll Date:	

### INDIVIDUAL/PARTICIPANT INFORMATION

All fields are required for account setup. Information is confidential and is not used for marketing purposes.

First Name:		MI:		Last Name:	
TASC ID (if known):		Email Address:			
Primary Phone:		Mobile Phone:			
Primary Address:	Address Line 1:				Apt:
	Address Line 2:				
	City:			State:	
	ZIP/Postal Code:			+4	
Date of Birth:		Hire Date:		Payroll Frequency:	

### ANNUAL ELECTIONS

Prior to completing your election amounts below, please refer to the instructions on page 2.

I select the following benefits and amount(s) to be deducted pretax:	Employee Annual Election Amount	EMPLOYER Annual Contribution	Maximum Employee Annual Election
<input type="checkbox"/> Healthcare FSA	\$	\$	\$
<input type="checkbox"/> Dependent Care FSA (Daycare Expenses)	\$	\$	\$

### TASC CARD

You will receive one TASC Card to use for your benefit account(s). You may request one additional card for your spouse or dependent free of charge. Cards are mailed to your home address 7-10 days after your enrollment has been processed.

To request an additional TASC Card for your spouse or dependent, print their name below (or request via TASC web portal):

1	Spouse or Dependent Name (First, MI, Last):	
2	Dependent Name (First, MI, Last):	
3	Dependent Name (First, MI, Last):	

\*\*AUTHORIZATION SIGNATURE REQUIRED ON PAGE 2\*\*

## • Enrollment Form

- Complete paper application and return to HR within **30 calendar days** of date of hire if enrolling
  - Enrollment only upon hire, in annual Open Enrollment period, or with a midyear qualifying event
  - Once the first payroll with your Flex election has been processed, neither coverage, election, nor contribution can change without a qualifying event
  - Flex spending contributions cannot be terminated or changed midyear except with an eligible qualifying event – deadlines and restrictions apply
- ## • Examples of qualifying events



# Pension

- Defined Benefit Plan through the Department of Employee Trust Funds (ETF) – Wisconsin Retirement System (WRS)
  - Participation is mandatory and automatic if eligible
  - Comes out of paycheck each pay period pre-tax
- Eligibility
  - Must be 60% full-time equivalent or more for permanent employees expected to work at least 12 months and hired after July 1, 2011
  - Hourly employees must work 12 months and 1,200 hours
  - Employees hired after July 1, 2011, become vested after **5 years** of WRS creditable service

# Pension

- **Contributions**

- **Mandatory**

- City pays employer portion of 7.2% (2026 rate)
    - Employee pays employee portion of 7.2% (2026 rate)

- **Voluntary**

- Additional contributions can be made after taxes to supplement regular WRS contributions
    - Additional contributions are subject to federal limits

- **Service Credit Purchase**

- You left WRS employment, took a separation benefit and returned to WRS employment. You may be eligible to buy **Forfeited Service**.
    - You are not a teacher and you began your WRS service before January 1, 1973. You may be eligible to buy **Qualifying Service**.
    - You have worked for a non-WRS public employer at the federal, state, or local level. You may be eligible to buy **Other Governmental Service**.
    - <http://etf.wi.gov/publications/et4121.pdf>



# Pension

- **Funds**

- Contributions are automatically placed in the **Core Trust Fund**, which is more stable and invested in a combination of bonds, fixed income securities, and common stock.
- Employees can opt to place 50% of contributions into the riskier **Variable Trust Fund (VTF)**, which is invested in a diversified equity portfolio.
- Employees can opt into the VTF at any time. If the enrollment form is received more than 30 calendar days after the date WRS participation begins, VTF participation will not start until the next January 1<sup>st</sup>.
  - VTF enrollment may be effective on the first day of WRS coverage if ETF receives the form within 30 calendar days after the date WRS participation begins.
- If an employee enrolls in the VTF and then elects to stop VTF contribution, there is no re-entry to the VTF.



# Pension

- **Retirement**

- Normal age is 65, or 54 for protective service employees
- Minimum age is 55, or 50 for protective service employees
- No age reduction factor for monthly benefit if employee has 30 years creditable service and retires at age 57 or later
- Intent is that benefit will provide total retirement income of between 50% and 85% of salary for career employee when added to Social Security
- More details are available from ETF here:  
<https://etf.wi.gov/retirement/saving-retirement/when-can-i-retire>

# Pension



Wisconsin Department of Employee Trust Funds  
 P.O. Box 7931  
 Madison, WI 53707-7931  
 etf.wi.gov  
 1-877-533-5020 (toll free)  
 Fax: (608) 267-4549

**Beneficiary Designation**  
 Wis. Stat. § 40.02 (8) (a) and 40.74

**Complete if applicable**

Beneficiary of: \_\_\_\_\_  
 Alternate Payee of: \_\_\_\_\_

**Do not submit to your employer**      **Refer to instructions on reverse Do not alter this form**

Type or print in ink

**Your Information**

Name First Middle I. Last Former/maiden Social Security number or ETF ID  
 Address (Street number and street name) Birth date (MMDDYYYY)  
 City State ZIP Code Weekday telephone number (Include area code)

**Primary Beneficiary Designation** - Any benefits payable by the Wisconsin Retirement System and Life Insurance program at my death shall be paid in EQUAL SHARES, unless otherwise specified, to the following primary beneficiary(ies) who survive me.

Name (First, Middle I., Last) or Name of trust AND trustee	Relationship	Birth date or Trust date	SSN or TIN	Phone	Address (street, city, state, ZIP code)

**Secondary Beneficiary Designation** - In the event all primary beneficiaries die before me, the death benefit shall be paid in EQUAL SHARES, unless otherwise specified, to the following secondary beneficiaries who survive me.

Name (First, Middle I., Last) or Name of trust AND trustee	Relationship	Birth date or Trust date	SSN or TIN	Phone	Address (street, city, state, ZIP code)

If you want this designation to apply only to specific benefit plan(s) or account(s), use this space to specify the benefit plan(s) or account(s) to which you want this designation to apply. See "Effective for all benefit plans and accounts" section on the reverse side before completing this section.

**Signature** I understand that Wis. Stat. § 943.395 provide criminal penalties for making false or fraudulent claims on this form and hereby certify to the best of my knowledge and belief, the above information is true and correct.

SIGN Signature (Do not print) \_\_\_\_\_ Date signed (MMDDYYYY) \_\_\_\_\_

## • Beneficiary Designation

- If no form is filled out, ETF will follow the standard sequence
- Incomplete forms will not be considered valid
- No white outs, cross outs, or changes are allowed
- Rejected forms will be returned to you
- Remember it is in effect until you change it! It is your responsibility to ensure it remains up-to-date and accurate

Note: The date the form is signed is not the date it becomes effective. A Beneficiary Designation form does not become effective until received and approved by the Department of Employee Trust Funds. The person filing the designation must still be alive when ETF receives the form. An acknowledgment will be sent when this designation has been reviewed and accepted. Invalid designations will be rejected.



# Deferred Compensation

- **457(b) Plans**

- Similar to 401k but for public employees, with no City match to employee contributions
- Voluntary investment opportunity offered through outside providers
  - Mission Square
  - Fidelity
- Contribution limit of \$24,500, or age 50 or over up to \$32,500 (2026 limits)
- Contributions can be started, stopped, or changed at any time, and minimum contribution usually \$25
- While working for City, funds can only be withdrawn if approved through Emergency Withdrawal process
- Contact MissionSquare or Fidelity for more information





# Mandatory Paperwork

# Initial Employment Forms to HR within First Week and I-9 within 3 business days.



- Orientation Checklist – items checked off, signed + dated
- W-4 and Wisconsin Withholding Forms
- Direct Deposit (if enrolling)
- I-9 Form
- Self-Declaration of Disability Form
- Emergency Contact Form
- Self-Identification Form

## **Return to Human Resources**

- In-Person at MMB Suite 261  
(215 Martin Luther King Jr.  
Blvd, Madison, WI 53703)
- Inter-D

# Return Completed Benefit Forms to HR by \_\_\_\_\_ (within 30 calendar days).



## As enrollments or waivers:

- Health Insurance
- Dental Insurance
- Vision Insurance
- Life Insurance
- Disability (Wage) Insurance

## Only if enrolling:

- Flex Spending

Failure to submit forms timely may result in waiting periods and/or underwriting.

## Return to Human Resources

- In-Person at MMB Suite 261  
(215 Martin Luther King Jr.  
Blvd, Madison, WI 53703)
- Inter-D

*Congrats & welcome!*

What questions do you have?

Tory Larson or Katarina Klafka

608-266-4615

[benefits@cityofmadison.com](mailto:benefits@cityofmadison.com)



# Calculation Assistance

Due dates, health insurance start dates, and life insurance costs

# Benefits Paperwork Due Dates

- **When is my benefits paperwork due?**

- Does the month of hire have 30 days? If so, 30 calendar days is the same date in the next month → April 2<sup>nd</sup> start date = May 2<sup>nd</sup> deadline
- Does the month of hire have 31 days? If so, 30 calendar days is the date in the next month **minus one** → May 2<sup>nd</sup> start date = June 1<sup>st</sup> deadline
- Did you start in February? If so, 30 calendar days is the date in the next month **plus two** for a non-Leap Year, or **plus one** for a Leap Year.

**HR strongly recommends you return your benefits paperwork within 1-3 weeks of your hire date to ensure we receive it before the deadline!**

# Health Insurance Start Dates

- **When will my health insurance begin?**

- If your start date is on or before the first Monday of a given month, then the employer contribution to your health insurance will start on the first day of the **following month**. → April 1<sup>st</sup> start date = May 1<sup>st</sup> health insurance start date.
- If your first day is after the first Monday of a given month, then the employer contribution to your health insurance will start on the first day of the **month after next**. → April 8<sup>th</sup> start date = June 1<sup>st</sup> health insurance start date.
  - In this scenario, you can opt to start your health insurance “As soon as possible” instead. If you opt for ASAP coverage, your health insurance will begin on the **next 1<sup>st</sup>** of the month, and you will be responsible for the **total** cost of the premium for that first month of coverage before the employer contribution begins. Please contact HR for more details.

# Life Insurance Premiums – New Hires

## • How do I calculate my life insurance premium?

### For Basic Coverage:

1. Take your annual salary and round up to the next highest \$1,000. This is your Basic Coverage amount.
2. Divide by \$1,000.
3. Multiply the divided number by the “cost per \$1,000 coverage” factor for your age group. The result is your premium for Basic Coverage.

### For Supplemental Coverage:

1. Take your highest annual salary of record and multiply by 0.5 (+50%), 1 (+100%), or 2 (+200%).
2. Round up to the next highest \$1,000. This is your Supplemental Coverage amount.
3. Divide by \$1,000.
4. Multiply the divided number by the “cost per \$1,000 coverage” factor for your age group. The result is your premium for Supplemental Coverage.

Age Group	Cost per \$1000 Coverage (Basic)	Cost per \$1000 Coverage (Supp.)
Under 25	\$0.05	\$0.035
25-29	\$0.06	\$0.042
30-34	\$0.08	\$0.056
35-39	\$0.09	\$0.063
40-44	\$0.10	\$0.07
45-49	\$0.15	\$0.105
50-54	\$0.23	\$0.161
55-59	\$0.43	\$0.301
60-64	\$0.57	\$0.399
65-69*	\$0.57	\$0.399
over 69*	Free (basic only)	\$0.399

\*Over age 65 rates and coverage apply only if working

# Life Insurance Premiums – New Hires

- **Example:** A new employee has a \$49,500 annual salary and is 40 years old.
  - **Basic Coverage:** \$49,500 rounded up: \$50,000 Basic
    - $\$50,000 / \$1,000 = 50$
    - $50 \times \$0.10 = \$5.00$  per month Basic premium
  - **Supplemental Coverage:** + 50% Level chosen
    - $\$49,500 \times 0.5 = \$24,750$
    - Rounded up = \$25,000 Supplemental Coverage
    - $\$25,000 / \$1,000 = 25$
    - $25 \times \$0.07 = \$1.75$  per month +50% Supplemental premium
  - **Total coverage:** \$50,000 + \$25,000 = \$75,000
  - **Total premium:** \$5 + \$1.75 = \$6.75 per month

Age Group	Cost per \$1000 Coverage (Basic)	Cost per \$1000 Coverage (Supp.)
Under 25	\$0.05	\$0.035
25-29	\$0.06	\$0.042
30-34	\$0.08	\$0.056
35-39	\$0.09	\$0.063
40-44	\$0.10	\$0.07
45-49	\$0.15	\$0.105
50-54	\$0.23	\$0.161
55-59	\$0.43	\$0.301
60-64	\$0.57	\$0.399
65-69*	\$0.57	\$0.399
over 69*	Free (basic only)	\$0.399

\*Over age 65 rates and coverage apply only if working