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Colleague Resources

Q: What is the best source of up-to-date information for colleagues regarding this transition?

A: Information on topics such as benefits, unemployment, severance, other career opportunities with HSHS, and much more is available via a **Colleague Portal**. This portal will be updated as additional information and details become available, so colleagues are encouraged to check back frequently.

<https://benefits.hshs.org/closure>

Username: hshs

Password: 1234

Q: I am interested in exploring other opportunities within HSHS. How do I go about this?

A: Colleagues who are interested in exploring other job opportunities within HSHS in our eastern WI or IL ministries or remotely are encouraged to visit our Career Site at <https://careers.hshs.org>. The portal referenced above also includes information on available career opportunities. The below Talent Acquisition colleagues are available to assist with the exploration of other job opportunities within HSHS.

Nursing Positions: Carol Hintz at Carol.Hintz@hshs.org or Kristin Byrnes at Kristin.Byrnes@hshs.org

Non-nursing Positions: Lauren Aman at Lauren.Aman@hshs.org

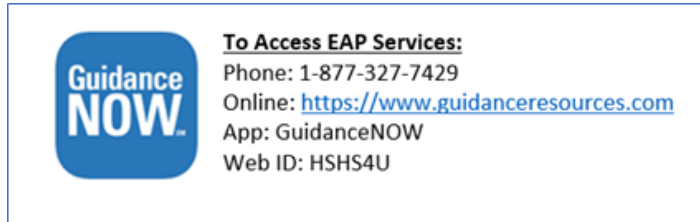
Corporate Positions: Lauren Frederick at Lauren.Frederick@hshs.org

Q: Are there other career resources available to me as I begin my search for a new job opportunity?

A: Yes. HSHS, in partnership with Lee Hecht Harrison, will be offering in-person and virtual workshops to impacted colleagues that will assist colleagues in resume building, interviewing techniques and job searching. HSHS, in partnership with the Job Center of Wisconsin, will also be offering in-person rapid-response information sessions covering topics such as dislocated worker services, unemployment, health insurance options and much more. Details on these sessions, including dates, times and location information, can be found on the Colleague Portal.

Q: Are Employee Assistance Program (EAP) resources available to me during this time? How do I initiate these services?

A: Yes. ComPsych, our EAP provider, will have support staff onsite the week of January 22, 2024 and who will be available to meet with and assist colleagues. Our EAP provides colleagues and their eligible dependents with support to manage the stress and challenges of life. This program is also available via the below contact information to all colleagues and their eligible dependents through June 2024, without enrollment, and at no cost to the colleague.



Timeline/Employment Status

Q: What is the timeline for the closure of the hospitals? What date will my employment with HSHS end?

A: Factors such as staffing levels and the ability to safely continue patient care will be continuously monitored by the HSHS leadership team to determine when certain services will close. Colleagues who are part of a department/service line that is closing will have opportunity for reallocation to other areas at Sacred Heart and St. Joseph's through that department's closure date as appropriate. If an opportunity for reassignment does not exist, regular status and PRN colleagues will be placed on a paid furlough leave through March 22, 2024, at which time employment would end and severance benefits (for eligible, regular status (non-PRN) colleagues) would begin.

Q: If my department is still open, I continue to be scheduled to work, and I refuse to report to work, what will happen to my employment?

A: In order to ensure that necessary operations can continue through the ministry closure date and that we are able to provide the best possible care to patients who continue to depend on us, all colleagues must continue to report for their scheduled shifts until otherwise notified by their leader and/or Human Resources. Refusal to report to work for scheduled shifts will be considered a voluntary resignation and colleagues will not be eligible for continuing pay under either furlough or severance.

Compensation/Benefits

Q: Will I be eligible for any additional compensation to assist in this transition?

A: Regular status (full-time and part-time, non-PRN) colleagues who are still employed as of March 22, 2024 or their department's closure date, whichever is later, will be eligible for a severance package to help with this transition. Non-management colleagues will be eligible for two (2) weeks of salary continuation plus an additional one (1) week for every year of continuous service up to a total of twenty-four (24) weeks. Management colleagues (excluding executives) will be eligible for four (4) weeks of salary continuation plus an additional one (1) week for every year of continuous service up to a total of twenty-four (24) weeks. Colleagues whose anniversary date in 2024 falls after their termination date will have the additional year of service honored for purposes of determining severance benefits. While further details will be shared at a future date, colleagues should expect to receive a severance packet mailed to their home address in late March. Colleagues who choose to leave employment prior to March 22, 2024 or their department's closure date, whichever is later, will not be eligible for severance benefits.

Q: What will happen to my HSHS benefits once my employment with HSHS ends?

A: For colleagues enrolled in HSHS benefits for plan year 2024, benefits will normally end at the end of the month in which employment ends. For colleagues and/or eligible dependents under age 65, medical and dental benefits may also be continued during the severance period, as applicable, at the normal biweekly amount. Following the severance period, for those under age 65, benefits can be continued for up to 18 months total (including the severance period) at the continuation rates. As applicable, colleagues will be mailed benefit continuation information to their home address on file at the time employment ends and will be directed on the process for electing benefit continuation beyond the severance period, if they choose to do so.

Q: What will happen to my Paid Time Off (PTO) balance once my employment with HSHS ends? Will it be paid out to me?

A: Yes. Any accrued and unused PTO at the end of employment will be paid out to the colleague at that time at 100% of base pay, along with any earned wages or salary.

Q: Will my Extended Illness Benefit (EIB) balance be paid out once my employment with HSHS ends?

A: No. EIB is not paid upon termination according to the standard rules under that grandfathered benefit.

Q: I have existing repayment commitments for a sign-on bonus and/or tuition assistance. In light of the hospital closures, will I be required to repay?

A: No. Any repayment commitments (i.e., sign-on bonuses, tuition assistance) will be completely forgiven. This applies to both colleagues who voluntarily leave employment prior to March 22, 2024 and those who remain employed through March 22, 2024 or beyond if their department has a later closure date.

Q: It was previously communicated that merit (pay-for-performance) increases would take place in February 2024. Will I be eligible for a merit increase?

A: Yes. Colleagues who otherwise would have been eligible for a merit (pay-for-performance) increase in February and who are still employed at that time (have not resigned) will still receive this increase in recognition of their work throughout FY23. Eligible colleagues will receive both a base pay increase, if applicable, and the retroactive lump sum bonus with an effective date of February 4, 2024 as previously communicated.

Q: It was previously communicated that Position in Range (PIR) and market adjustments, as appropriate/applicable, would take place in February 2024. Will I be eligible for these pay adjustments?

A: No. While colleagues will be eligible for merit increases as outlined above, colleagues will not be eligible for PIR or market adjustments that occur in February, as those types of pay adjustments are for work performed in the future.

Q: Can I cancel my current Health Plan coverage based on this announcement? Is this considered a qualifying life event?

A: Yes. This is considered a qualifying life event and you can change or drop coverage under the health plan if you choose to do so. If you wish to make changes, we ask that you please complete the [2024 Benefit Changes Form](#). Please submit this form and all supporting documentation to the HSHS HR Service Center via email at MyHR@hshs.org or fax to 217-492-5896. You may also call the HSHS HR Service Center at 855-394-4747 (Option 3) to make your changes over the phone.

The following FAQ has been updated as of 2/2/2024:

Q: With the ministry closures, will HSHS be making any changes to the insurance network for those who carry health coverage through HSHS? Can I go to Mayo, for instance?

A: Colleagues living in the western Wisconsin area and enrolled in the DHP/Prevea360 plan will be provided an extended network that includes access to all providers in the First Health network. *These providers will be covered at the "Other Prevea 360" network provider level.* Mayo, Aspirus, and OakLeaf Surgical Hospital are just some of the providers within the First Health network that colleagues and dependents will have access to. **The First Health network and expansion is effective immediately.** To find a provider, click [HERE](#) or enter the following URL <https://providerlocator.firsthealth.com/Home/Index>

Q: If I transfer to another HSHS ministry as a result of the closure, is this considered a qualifying life event?

A: Yes. HSHS is considering this a significant life event that does qualify as a qualifying life event (QLE). Please note there are limitations surrounding what enrolled benefits can be changed, so please reach out to the HSHS HR Service Center to discuss your options. If you wish to make changes, we ask that you please complete the [2024 Benefit Changes Form](#). Please submit this form and all supporting documentation to the HSHS HR Service Center via email at MyHR@hshs.org or fax to 217-492-5896. You may also call the HSHS HR Service Center at 855-394-4747 (Option 3) to make your changes over the phone.

Q: What will happen to my vision benefits once my employment with HSHS ends?

A: If you are enrolled in any HSHS benefits at the time your employment ends, coverage will normally end on the last day of the month in which employment ends. You will have the ability to continue health and dental benefits during the severance period, as applicable. You can maintain voluntary vision benefits following the end of your employment by converting or porting to an individual policy with the insurer. For more information or to enroll, please contact VSP at 1-800-877-7195 or visit www.vsp.com.

Q: I am currently enrolled in one of the following accounts FSA, DCRA or HSA, on what date will my contributions stop being deducted from my paycheck?

A: For colleagues enrolled in the FSA, DCRA, or HSA, your benefits will end at the end of the month in which employment is terminated and deductions will continue to be withheld through your final regular paycheck. Deductions will not be withheld from any severance pay.

Q: Will I be eligible to continue contributing to my FSA or HSA while on severance?

A: No. If you accept a severance package, HSHS will continue your **health and dental benefits only**, if eligible, unless you notify HSHS that you have other coverage. All other benefits will end at the end of the month in which employment is terminated. You may continue to contribute to your HSA on your own directly with HealthEquity if you remain covered by a qualifying high-deductible health plan.

Q: I am currently enrolled in the High Deductible Plan with Health Savings Account (HSA), when will HSHS stop contributing to my account?

A: The \$25 per-pay period contribution that HSHS currently makes to your HSA will cease once your employment with HSHS ends. As a reminder, HSAs are individually owned accounts that you keep regardless of whether you change health plans, retire, or leave employment.

Q: I am currently enrolled in the Health Care Flexible Spending Account (FSA), can I continue to use the account and what is the deadline for submitting claims to HealthEquity?

A: Claims for services received through your employment end date are eligible for reimbursement. Qualifying health care claims must be filed with [Health Equity](#) (2024 contributions) by May 1, 2025, which is the year following the plan year in which you contributed to the spending account. Your HealthEquity Visa Health Account card will be automatically canceled on your employment end date.

Q: I am currently enrolled in the Dependent Care Flexible Spending Account (DCRA), what is the deadline for submitting claims to HealthEquity?

A: Claims may be submitted for dependent care expenses up to the amount in your account at your employment end date and must be incurred prior to your employment end date. Qualifying dependent care claims must be filed with [Health Equity](#) (2024 contributions) by May 1, 2025, which is the year following the plan year in which you contributed to the spending account.

Q: I am currently enrolled in the Health Savings Account (HSA), what is the deadline for submitting receipts or copies of claims to HealthEquity?

A: Unlike Flexible Spending Accounts (FSA), you own your HSA. That means your funds never expire, even if you change health plans, retire, or leave employment. After your employment ends, you will be responsible for paying any monthly admin fees on the account. This is currently \$3.95 per month. Anyone needing to submit claims will need to do so by logging into [Health Equity](#).

Q: I am currently enrolled in the Accident, Critical Illness, or Hospital Indemnity Plan, can I still utilize this coverage during the furlough period, and can I continue this coverage once my employment with HSHS ends?

A: Yes. If you are enrolled in any HSHS benefits at the time your employment ends, coverage will end on the last day of the month in which employment is terminated. You can maintain any of these coverages following the end of your employment by porting to an individual policy with the insurer. For more information, please contact Unum at 1-800-635-5597 or visit <https://login.unum.com>.

Q: I am currently enrolled in the HSHS Nursing Career Ladder Program. Can I submit my portfolio early for review and receive my bonus?

A: Per the guidelines outlined in the HSHS Nursing Career Ladder Program, points must be obtained within a designated submission period, and the application to advance on the ladder is restricted to annually. Nursing colleagues who pledged for the January 2023 – January 2024 period will receive their bonuses as expected. Nursing colleagues who pledged for the July 2023 – July 2024 period will NOT be eligible to receive a bonus.

Furlough and Reassignments

Q: What will happen if my department/service line closes sooner than March 22, 2024?

A: If a colleague is part of a department/service line that closes sooner than March 22nd, they will have opportunity for reallocation to other areas at Sacred Heart and St. Joseph's through that department's closure date as appropriate. If an opportunity for reassignment does not exist, colleagues will be placed in a furlough status and paid through March 22nd.

Q: What is furlough?

A: A furlough is temporary leave while maintaining your HSHS Total Rewards benefits. Furlough leave will be paid and will last through March 22, 2024, at which time employment would end and severance benefits (for eligible, regular status (non-PRN) colleagues) would begin.

Q: Will I be paid during the furlough leave period?

A: Yes. During the furlough period, regular status colleagues will be paid according to the colleague's weekly budgeted hours (FTE) at their base (hourly) rate. PRN status colleagues will be paid an average weekly wage based on a 3-month look-back period. Your pay will be issued on HSHS's regularly scheduled pay dates and will be paid according to the banking information in your Workday record.

Q: Can I perform any work during the furlough period?

A: No. Colleagues cannot perform work in any capacity for HSHS during the furlough leave period. If you obtain employment outside of HSHS during the furlough period, you must notify the HSHS HR Service Center (MyHR@hshs.org or via phone at 1-855-394-4747 Option 3) promptly so that your termination is processed accordingly.

Q: If I am placed on a furlough, will I be responsible for entry of my time?

A: No. The HSHS Human Resources and Payroll teams will manage entry of all paid furlough time onto colleagues' timecards, as well as approval of these timecards.

Q: If I am placed on furlough, what will happen to my HSHS pay and benefits?

A: While colleagues will not be actively working while on furlough, they will be paid and maintain all benefits during this time period. Since PTO is accrued based on hours worked, no additional PTO accrual will occur during the furlough period.

Q: Will I maintain access to my HSHS email and other systems during the furlough period?

A: No. Colleagues who are placed on furlough will no longer have access to HSHS systems. Prior to moving to furlough status, colleagues should verify that their home address and phone number listed in Workday are accurate and update as needed. Colleagues who are on furlough will have access to the colleague portal (see Colleague Resources section below) for updates.

Q: Will payroll deductions for my Total Rewards benefits be stopped during the furlough period?

A: No. Benefit elections will remain active during the furlough leave period and your payroll deductions will be withheld from your biweekly pay as normal.

Q: Will my voluntary payroll deductions (i.e., United Way, Foundation) remain active during the furlough period?

A: Yes. Your voluntary payroll deductions will remain active. If you wish to stop any voluntary deductions, please contact the HSHS HR Service Center.

Q: Will I accrue PTO during the furlough period?

A: No. Colleagues placed on a furlough leave will not accrue PTO during the furlough period. Your PTO balance will remain, and all accrued and unused hours will be paid out at 100% of your base pay on your final paycheck following the end of your employment.

Q: Can I change my benefit elections, including my Flex Spending accounts?

A: Yes. This is considered a qualifying life event and you are able to change or drop coverage under the health plan if you choose to do so. If you wish to make changes, we ask that you please complete the [2024 Benefit Changes Form](#). Please submit this form and all supporting documentation to the HSHS HR Service Center via email at MyHR@hshs.org or fax to 217-492-5896. You may also call the HSHS HR Service Center at 855-394-4747 (Option 3) to make your changes over the phone.

Q: If I am placed on a furlough, what should I do with my HSHS badge, equipment, keys, etc.?

A: Colleagues who are placed on furlough are asked to leave their badge, equipment, keys, etc. on premises in their department prior to departing on their last shift worked. For those who have equipment at home that must be returned, return options are being provided. All equipment that colleagues have at home may be returned to **Sacred Heart Hospital – Atrium Conference Room** (located next to the gift shop off the main lobby) **during the designated dates and times listed [HERE](#)**. Should you have any questions about the return of HSHS-issued hardware (i.e., laptop, monitors, etc.), please contact Dan Pasch at Daniel.Pasch@hshs.org.

Q: If I am placed on a furlough, how will I access my pay advices/stubs?

A: Colleagues who are placed on furlough will be able to access pay advices/stubs through ADP. A flyer outlining the steps for registration for the ADP portal can be found in the colleague packets which were disseminated to colleagues the week of January 22nd and is also included on the colleague portal.

Q: If I secure a job outside of HSHS during the time that I'm on furlough, what should I do?

A: Colleagues who secure a job outside of HSHS during the furlough period should immediately notify the HSHS HR Service Center at MyHR@hshs.org or via phone at 1-855-394-4747 Option 3. At that time, the paid furlough would end and a voluntary termination will be processed. Colleagues who resign prior to March 22, 2024 or their department's closure date, whichever is later, will not be eligible for severance benefits.

Q: If my department closes and others are still open, will I be required to move into a different job code instead of being furloughed if there is a need?

A: There could be opportunities to transition to other areas that need support. Human Resources will work with leadership to inform anyone who may be asked to assist in other areas. Colleagues will not be forced to move into a department or position that they are not already competent in.

Q: If I am asked to move into a different job code, will my rate of pay remain the same?

A: Yes. Anyone who transitions to another job code through the ministry closure will continue to be paid the same hourly rate.

Q: If my department closes and there are 20 colleagues who can be reallocated to other departments but there is only a need for 10, how is the decision made on who is placed on furlough and who continues to work?

A: Colleagues who volunteer for furlough will be placed on furlough first. If there are additional colleagues who are part of the department that is closing and not enough opportunities for reassignment exist, factors such as type of role, skill set needed for the role, shifts needing coverage and colleague seniority will be considered in choosing who is reassigned and who is placed on furlough.

Q: If my department remains open/I am required to work beyond March 22nd but not until April 22nd, will I receive furlough pay after I am done working and until April 22nd?

A: No. If your department remains open, you will continue to work as normal. When your department/service line closes, your employment would end at that time and severance benefits (for eligible, regular status (non-PRN) colleagues) would begin.

Q: When will I receive my final regular paycheck following the end of my employment?

A: For colleagues whose employment ends March 22, 2024, HSHS will process final wages owed, including PTO payout, within 24 hours following the end of employment. Precisely when the funds will be accessible by the colleague may vary depending on the financial institution. Colleagues who terminate voluntarily prior to March 22, 2024 will receive their final paycheck on the next regularly scheduled pay date following the end of their employment.

Q: What do I have to do to ensure that I keep benefit coverage?

A: If you are placed on a furlough leave, during the furlough period, all benefits will remain active. If you are eligible for a severance package, once the agreement has been executed, HSHS will continue your health and dental benefits if you are eligible for that continued coverage, unless you notify HSHS that you have other coverage. Following the severance period, for those under age 65, benefits can be continued for up to 18 months total (including the severance period) at the continuation rates. As applicable, colleagues will be mailed benefit continuation information to their home address on file at the time employment ends and will be directed on the process for electing benefit continuation beyond the severance period, if they choose to do so.

Q: How long do I have to cash out my HSHS Appreciation Hub points?

A: Colleagues who have HSHS Appreciation Hub points in their account will be eligible to redeem their points for up to 15 days after the date employment ends. To access the HSHS Appreciation Hub, please visit <https://hshsappreciationhub.isrewards.com> and enter your username (6-digit colleague ID number) and password under "Username and Password Entry". If you have forgotten your password, click the "Forgot Password" link.

Q: If I accept a position at another HSHS ministry outside of western WI, will moving assistance be offered?

A: HSHS may have open positions that offer sign-on bonuses to the colleague hired for the role. Sign-on bonuses may be used to cover any expenses, including relocation costs.

Q: Can I submit a NEW Education Assistance application during the furlough period?

A: No. New applications will not be accepted during the furlough period.

Q: While on furlough, can I submit reimbursement under an Education Assistance application previously approved and if so, how will reimbursement be made?

A: Yes. Colleagues can still submit requests for reimbursement by emailing the HR Service Center at MyHR@hshs.org. Please include your full name, the name of the college/university, and attach documentation of grades/transcripts to the email. Reimbursement will be made via direct deposit as part of your normal bi-weekly paycheck within three pay periods of final grade submission.

Leaves and Disability

Q: I'm currently out on an approved short-term disability leave; am I eligible to continue receiving STD payments?

A: Eligibility for and enrollment in the HSHS short-term disability plan will end as of the date the colleague's employment ends.

Q: If I am placed on a furlough, how will this affect my eligibility for short-term disability and/or Family Medical Leave?

A: Colleagues on furlough may still apply for short-term disability and/or Family Medical Leave. If approved, the provisions of the furlough would end, and the short-term disability and/or Family Medical Leave benefits/protections would apply as normal through the approval date of the leave or the date the colleague's employment ends, whichever is sooner.

Q: I was previously out on an approved short-term disability leave and have been released to return to work. What are my options?

A: Colleagues who have been released to return to work from short-term disability prior to their department's closure date must contact the HSHS Leave team before returning to work. The Leave team can be reached at Leave@hshs.org or by phone at 1-855-394-4747 Option 3. The Leave team will work with departmental leadership to determine if staffing needs exist at that time. If the colleague's department/service line has been

closed and/or an opportunity for reassignment does not exist, the colleague will be placed on paid furlough from the date of the release through March 22, 2024.

Severance Package

Q: When will severance pay begin?

A: For eligible, regular status (non-PRN) colleagues who sign a severance agreement, severance payments would begin following the last day of employment. Additional details on the severance package, including when and how to return the signed agreement, etc. will be shared with colleagues beginning in late March.

The following FAQ has been updated as of 3/21/2024:

Q: If I sign a severance agreement and agree to continue my benefit plans during the severance period, when will my benefit(s) coverage end?

A: For eligible, regular status (non-PRN) colleagues who sign a severance agreement and continue to participate in the benefit plans during the severance period, benefits will remain active up through the end of the month in which the severance period ends.

Q: Will the severance payments end if I find a job outside of HSHS?

A: No. Once severance payments begin, they will continue as outlined in the agreement, regardless of whether you find other employment or not.

Q: Will the severance payments end if I find another job within HSHS and am rehired?

A: Yes. If you are rehired at an HSHS affiliate during your severance period, severance payments would cease immediately following your rehire date with that affiliate.

Q: How are years of continuous service calculated for the severance package amounts?

A: Your continuous service date listed in your Workday profile will be used to determine your years of service. Your continuous service date, in most instances, is equal to your original hire date with HSHS unless you experienced a break in service. Colleagues whose anniversary date in 2024 falls after their termination date will have an additional year of service counted to determine severance benefits. For more details, please click [HERE](#).

Q: Who is considered “management” for purposes of the severance packages?

A: Management includes supervisors, managers, local directors, and regional/market directors.

Q: If I obtained employment elsewhere during my furlough period, but the job/pay isn't comparable to what I am currently doing, do I still have to report that I obtained employment elsewhere?

A: Yes. Colleagues who secure a job outside of HSHS during the furlough period should immediately notify the HSHS HR Service Center at MyHR@hshs.org or via phone at 1-855-394-4747 Option 3. At that time, the paid furlough would end and a voluntary termination will be processed. Colleagues who resign prior to March 22, 2024 or their department's closure date, whichever is later, will not be eligible for severance benefits.

Q: If my department is open beyond March 22nd, will I still be offered a severance package once the department closes?

A: Yes. Regular status (non-PRN) colleagues who work past March 22nd will be eligible for a severance package at the time their employment ends.

Q: I am age 65 or older and eligible for Medicare. Will my dependents be eligible to continue medical and dental benefits during the severance period?

A: Yes. However, your dependents who remain under the age of 65 will need to elect HSHS continuation coverage on their own. Benefits can be continued for up to 18 months total (including the severance period) at the continuation rates. If they wish to enroll in coverage outside of HSHS, they can do so through the [Healthcare Marketplace](#).

Q: I am age 65 or older, will I be eligible to continue dental insurance coverage during the severance period?

A: Yes. Colleagues, regardless of age, can continue dental insurance coverage for up to 18 months if you were covered for the previous three months before you separate employment. Premiums for continued dental coverage during the severance period will be deducted from each severance payment. During the severance period, the premiums will be at the colleague rates. At the end of the severance period, colleagues may continue coverage by paying the full premium amounts indicated on the Colleague Portal.

Q: I submitted my resignation prior to the announcement. Can I rescind/alter my resignation date in order to be eligible to receive a severance package?

A: No. The date previously submitted by the colleague prior to the announcement or the date employment would have otherwise ended due to the closure, if that happens sooner, will be used.

Q: I submitted my future retirement date prior to the announcement. How will this impact my eligibility for severance?

A: The retirement date previously submitted by the colleague prior to the announcement or the date employment would have otherwise ended due to the closure, if that happens sooner, will be used. As long as the colleague remains employed through March 22, 2024 or their department/service line's closure date, whichever is later, once employment ends, colleagues are still eligible to elect to commence their Pension benefits and receive severance payments.

Q: I am PRN now, but I am willing to work full or part-time until the closure. Is it possible to move to regular status so that I can be eligible for the severance?

A: No. FTE changes will not be allowed during this time.

Retirement

Q: Will my pension benefits be impacted by this change?

A: No. There will be no impact to pension benefits as a result of these closures.

Q: Can I collect my HSHS Pension benefits and receive the severance package offered through HSHS?

A: Yes. Once an official termination from HSHS occurs, colleagues are still eligible to elect to commence their Pension benefits and receive severance payments.

Q: I'm a colleague in the Final Average Pay (Traditional) Pension Plan. When will I receive information regarding my final Pension calculation and Pension information?

A: As communicated throughout 2023, the Hospital Sisters Health System Traditional Final Average Pay (FAP) Pension Plan was frozen as of December 31, 2023. HSHS committed to providing you with final calculations of earned benefits after the 2023 calendar year. The final lump sum present value calculation of the pension benefit you earned up through December 31, 2023, is **NOW** available and can be accessed on the [HSHS Pension Portal](#). As a reminder, these benefits are scheduled to transfer to your 403(b) account with Fidelity Investments at the beginning of May 2024, unless you are of retirement age (age 55+) and choose to commence your monthly pension annuity.

Q: Will my 403(b) Plan remain active during the furlough period?

A: Yes. Your 403(b) Retirement Savings Plan will remain active. Your deferral election will continue per the normal process during the furlough period. You may choose to stop or update your deferral elections by logging into your Fidelity NetBenefits account, by clicking [HERE](#) or by calling Fidelity at 1-800-343-0860.

Q: Will my 457(b) Plan remain active during the furlough period?

A: Yes. Your 457(b) Retirement Savings Plan will remain active. Your deferral election will continue per the normal process during the furlough period. You may choose to stop or update your deferral elections by logging into your Fidelity NetBenefits account, by clicking [HERE](#) or by calling Fidelity at 1-800-343-0860.

Q: What will happen to the funds in my 403(b) account with Fidelity once my employment with HSHS ends?

A: Your account will remain open giving you the option to leave your funds in the 403(b) after your employment ends. If you choose, your account may be distributed to you when you terminate employment with HSHS. To defer taxes and avoid penalties for early withdrawal, your account balance may be rolled over directly to an Individual Retirement Account (IRA) or another qualified employer plan that allows rollovers. If over age 59 ½, you may take a lump sum or an alternative form of distribution penalty free from Fidelity, such as installments. You may be required to take distributions beginning at age 72. To learn more about your options, log into your Fidelity NetBenefits account, by clicking [HERE](#) or by calling Fidelity at 1-800-343-0860.

The following FAQ has been updated as of 3/1/2024:

Q: Since my accrued and unused PTO balance will be paid out on my final regular paycheck following my termination date, can I update my current 403(b) deferral election to account for my PTO payout for tax purposes?

A: Yes. Please note this is contingent on your actual termination date, as we know some termination dates will fluctuate depending on operational needs. For those with a termination date of 3/22/2024, a deferral change must be made between **3/8/2024 and 3/15/2024** to take effect for your last paycheck. **IMPORTANT:** Due to payment timing, your deferral changes will apply to both your normal paycheck on 3/22/2024 as well as your final paycheck which includes your PTO payout. To make the changes you will do this by contacting Fidelity at 800-343-0860 or by logging into [Netbenefits.com/atwork](https://netbenefits.com/atwork). If you have questions regarding this process, please contact the HSHS HR Service Center at 1-855-394-4747 (Option 3).

Q: Is there a vesting requirement for the 403(b) Plan with matching contributions?

A: No. Colleagues are always fully vested (100%) in all contributions.

Q: Will I receive an employer contribution to the 401(a) Plan in 2025 for hours and earnings worked in 2024?

A: To earn a year of service and to receive an annual contribution under the 401(a) Plan, you must be actively employed by HSHS on December 31 of the plan year and have worked at least 1,000 hours during the plan year, unless you terminate with HSHS after reaching normal retirement age (65), die, or become disabled (as defined by the plan).

Q: Will I receive an employer match on the 403(b) and/or 403(b) Roth in 2025 for contributions made in 2024?

A: To receive a matching contribution, you must be actively employed by HSHS on December 31 of the plan year and have worked at least 1,000 hours during the plan year. Colleagues terminating employment during the year due to death, disability, or after reaching age 55 are also eligible to receive matching contributions.

Miscellaneous

Q: Given this announcement, am I still required to complete my Workday Learning assignments, including the assigned compliance courses?

A: At the beginning of 2024, all HSHS colleagues were assigned annual required learning courses due March 31st. While these courses remain available to you while you are actively working (not furloughed), impacted colleagues will NOT be required to complete these courses.

Q: Am I able to apply for unemployment benefits?

A: Yes. For more information related to unemployment benefits, colleagues may contact their local unemployment office. Your local unemployment office can provide direction on timeframe for applying for unemployment benefits given the expected closure timeframe.

Wisconsin Department of Workforce Development

<https://dwd.wisconsin.gov/uiben/apply/>

(608) 266-3131

The following FAQ is new/has been updated as of 2/2/2024

Q: How can I access my Colleague Health Records?

A: To obtain your health records, please email your request to MyColleagueHealth@hshs.org. Once the request has been received, a member of that team will pull the applicable files for you.