

Change Employment Category

Transferring from Faculty, Academic Staff, Limited Appointee to University Staff or
From University Staff to Faculty, Academic Staff, Limited Appointee

Benefit Plan	Guidelines	Comments	ADM Event Date
HR Job Data	<ul style="list-style-type: none"> • If employee was transferred into the new position, then no further action is necessary. • If employee is going on a leave of absence from first position to take the new position with a new Empl Rcd— <ul style="list-style-type: none"> ○ Change the Benefit Primary Flag to the new Empl Rcd so benefits are taken from correct job. Review Rebuilding Benefits Primary Job Flags in HRS (KB 27798). • If employee is voluntarily electing to be reassigned, review Voluntary Reassignment Process (Univ Staff to Academic Staff/Limited) in HRS (KB 53474). 		
State Group Health Insurance, Preventive Dental Insurance, Supplemental Dental Insurance, Vision Insurance, State Group Life Insurance, Individual & Family Life Insurance, UW Employees, Inc. Life Insurance, Accidental Death & Dismemberment Insurance, and Accident Insurance		Verify deductions taken correctly during the change.	N/A
University Insurance Assoc. (UIA) Life Insurance	<ul style="list-style-type: none"> • If switching from University Staff to FA/AS/LI, employee is automatically enrolled as of January 1st, if eligible. • If switching from FA/AS/LI to University Staff, employee loses coverage at the end of the plan year (December 31st) and is eligible for conversion. Employee will receive a conversion notice at the end of the plan year. <ul style="list-style-type: none"> ○ Employee is eligible to convert coverage if form is submitted to Securian within 31 days of the coverage end date. 	Remind employee to fill out beneficiary designation if newly enrolled.	N/A
Flexible Spending Account (FSA)	<ul style="list-style-type: none"> • HRS will adjust deduction amount automatically. 	When you process the MSC Event to move employee into their new benefit program it will waive them out of FSA/HSA. Create an ADM event for the 1 st of the month on or following the employment switch and re-enroll them. Verify deduction is taken correctly first payroll after the change.	FSA Event: 1 st day of the month on or following the switch.
Health Savings Account (HSA)		Before re-enrolling in HSA, verify that employee is enrolled in HDHP.	

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Income Continuation Insurance (ICI)	<ul style="list-style-type: none"> • Provisions in the plan are different for FA/AS/LI and University Staff employees. • If previously insured, employee must submit application within 30 days to continue coverage regardless of the type of change. • If not previously insured, switching from University Staff to FA/AS/LI – Employee has an enrollment opportunity. <ul style="list-style-type: none"> ○ If employee does not enroll when eligible, employee may have deferred enrollment opportunities or may apply through Evidence of Insurability. • If not previously insured, switching from FA/AS/LI to University Staff – Employee does not have an enrollment opportunity. <ul style="list-style-type: none"> ○ Employee may have deferred enrollment opportunities, dependent on sick leave balances. <p>Employee may apply through Evidence of Insurability.</p>	<p>If employee misses enrollment opportunity there may be a deferred enrollment opportunity (provisions depend on their employment category)</p> <p>If previously enrolled, coverage will not lapse if application is submitted timely.</p>	<p>1st of the month on or following the start of the new position.</p>
Wisconsin Retirement System (WRS)	<ul style="list-style-type: none"> • If employee is in an eligible WRS position, WRS contributions will automatically adjust and continue. 	<p>If employee is in one of their 3 highest years the change could affect their retirement annuity because their high year of earnings will be allocated to two different WRS annual earnings periods.</p> <ul style="list-style-type: none"> • FA/AS/LI service is based on a fiscal year. • University Staff service is based on a calendar year. <p>One year of creditable service:</p> <ul style="list-style-type: none"> • FA/AS/LI – 1320 Hours • University Staff – 1904 Hours 	<p>N/A</p>

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UW 403(b) Supplemental Retirement Program (SRP)	<ul style="list-style-type: none"> Have employee review their contribution election(s). If a change is needed employee can make their change in the MyUW Portal (instructions) or they can complete a Salary Reduction Agreement. 	Review employee’s paychecks to ensure deduction(s) are correct. The employee’s contribution election(s) should be deducted from all eligible pay.	SAV Event: 1 st day of the payroll where the change becomes effective.
Wisconsin Deferred Compensation (WDC) 457 Program	<ul style="list-style-type: none"> Have employee review their contribution election(s) and contact WDC to adjust their contribution election(s) as necessary. 	Review employee’s paychecks to ensure deduction(s) are correct. The employee’s contribution election(s) should be deducted from all eligible pay.	SAV Event: 1 st day of the payroll where the change becomes effective.
General Deductions	<ul style="list-style-type: none"> Review General Deductions to see if an adjustment needs to be made. 	Examples: Athletic Fees, Partners in Giving contributions.	1 st day of the payroll where the change becomes effective.
Leave Balances	<p>Transfer leave balances to proper bucket (submit a request to UW-Shared Services, Service Operations at serviceoperations@uwss.wisconsin.edu). FA/AS/LI and University Staff have different leave bucket limits. Depending on the employee’s situation, some payouts may be necessary before transfer. Review:</p> <ul style="list-style-type: none"> UW System Administrative Policy 1287 (formerly TR 3) Voluntary Reassignment of Formerly Classified FLSA Exempt Employees to Academic Staff/Limited Appointment Positions UW System Administrative Policy 1210 (formerly BN 1) Vacation, Paid Leave Banks, and Vacation Cash Payouts UW System Administrative Policy 1211 (formerly BN 2) Personal Holiday Administration HRD Policy 16.04 Vacation (UW-Madison only) HRD Policy 16.02 Personal Holidays (UW-Madison only) <p>Compensatory time is non-transferrable and must be paid out.</p>		

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Banking Vacation (Paid Leave Bank) During Transition Year:

- Employees who move from University Staff to FA/AS/LI on or before June 30 or during the annual banking period (July 1 – September 30):
 - Election to bank is due on or before September 30.
 - FA/AS/LI banking provisions apply (no cash payout provision).
- Employees who move from FA/AS/LI to University Staff on or before December 31 or during the annual banking period (December 1 - December 31):
 - Election to bank is due on or before December 31.
 - University Staff banking provisions and cash payout provisions apply.