

Transfer from a State Agency

Note: Upon receipt of the personnel transfer record and insurance applications, verify that the employee is up-to-date with premium payments.

Benefit Plan	Information	Action Employee Must Take
State Group Health Insurance	<ul style="list-style-type: none"> Employee may only continue coverage they had in force at transfer. There is no enrollment opportunity. 	Employee needs to fill out application to continue coverage with UW System within 30 days of transfer. If transfer results in move to another county, employee has 30 days from day of move to change health plans.
Supplemental Dental Insurance (Delta Dental)	<ul style="list-style-type: none"> Employee may only continue coverage they had in force at transfer. There is no enrollment opportunity. 	Employee needs to fill out application to continue coverage with UW System within 30 days of transfer.
Vision Insurance (VSP)	<ul style="list-style-type: none"> Employee may only continue coverage they had in force at transfer. There is no enrollment opportunity. 	Employee needs to fill out application to continue coverage with UW System within 30 days of transfer.
State Group Life Insurance	<ul style="list-style-type: none"> Employee may only continue coverage they had in force at transfer. There is no enrollment opportunity. 	Employee needs to fill out application to continue coverage with UW System within 30 days of transfer.
Individual & Family Life Insurance	<ul style="list-style-type: none"> Employee has an enrollment opportunity. 	Employee must fill out application to enroll within 30 days of transfer. Remind employee to fill out beneficiary designation when enrolled.
UW Employees, Inc. Life Insurance	<ul style="list-style-type: none"> Employee has an enrollment opportunity. 	Employee must fill out application to enroll within 30 days of transfer. Remind employee to fill out beneficiary designation when enrolled.
Accidental Death & Dismemberment (AD&D) Insurance	<ul style="list-style-type: none"> Employee has an enrollment opportunity. 	Employee may enroll at any time. Remind employee to fill out beneficiary designation when enrolled.
University Insurance Assoc. (UIA) Life Insurance	<ul style="list-style-type: none"> If eligible, employee will automatically be enrolled in October. 	Inform employee about plan and remind employee to fill out beneficiary designation when enrolled.

Benefit Plan	Information	Action Employee Must Take
Flexible Spending Account (FSA)	<ul style="list-style-type: none"> Employee may only continue coverage they had in force at transfer. There is no enrollment opportunity. 	Previous State agency will provide TASC with a Transfer Form with the employee's account details. They will also provide the institution with the employee's annual election and YTD balance on the Personnel Transfer Record (PTR). Enter the enrollment into HRS based on the PTR.
Health Savings Account (HSA)		If transfer results in a move of residence, employee has 30 days from move to change his/her Dependent Care FSA annual election if the change in residence resulted in a change in cost or coverage of their dependent care provider.
Income Continuation Insurance (ICI)	<ul style="list-style-type: none"> Employee may only continue coverage they had in force at transfer. There is no enrollment opportunity. If employee is enrolled in Category 2, 3, 4, 5 or 6 –submit a WiscIT to the UW System Service Center to populate the correct eligibility for the ICI plan. If you do not, when you get to the ICI enrollment box, it will not give you the proper category choice. 	Employee needs to fill out application to continue coverage with the UW System within 30 days of transfer.
Tax-Sheltered Annuity (TSA) 403(b)	<ul style="list-style-type: none"> Employee is now eligible for TSA. 	Employee may sign up at any time.
Wisconsin Deferred Compensation (WDC)	<ul style="list-style-type: none"> Employee should notify WDC that they are now a UW System employee – deductions will continue. They should also work through WDC if they need to change their contributions due to a change in payroll frequency. 	No action needed.
Wisconsin Retirement System (WRS)	<ul style="list-style-type: none"> No Change 	No action needed.
HRS Procedures	<ul style="list-style-type: none"> Enter Adjusted Continuous Service Date in HRS according to what is on the transfer record. Change Benefits Service Date (located in Job Data – UW Benefits tab) to WRS begin date. (If this is not done, the employer contribution for SGH, ICI will not process properly) 	
Personnel Transfer Record	<ul style="list-style-type: none"> Personnel Transfer Record (PTR) should be sent to you by State agency after the employee's final payroll with them calculates. Once you receive the PTR, you will know what benefits they are enrolled in. 	
Paid Leave	<ul style="list-style-type: none"> Send a WiscIT to the UW System Service Center with a copy of the transfer record to request that the employee's leave balances be populated with the balances that were eligible for transfer. 	