



Transfer from a State Agency

The information below applies to an employee that is transferring from a State of Wisconsin Agency to the Universities of Wisconsin.

Personnel Transfer Record	After the employee's final paycheck with the prior state agency has been processed, the prior State agency sends the completed Personnel Transfer Record (PTR) form to UW-Shared Services, Service Operations at serviceoperations@support.wisconsin.edu . The PTR form contains information about the benefits the employee is enrolled in. Once received, UW-Shared Services, Service Operations Benefits Service Delivery adjusts leave balances and Benefits Administrator receives notification to counsel employee (provide and collect completed applications for plans employee was enrolled in). Reference Sick Leave Credit Transfer Between WI Agencies for information on sick leave eligible to be transferred from State agencies and State authorities.	
HRS Procedures	UW-Shared Services, Service Operations: <ul style="list-style-type: none"> Enters Adjusted Continuous Service Date in HRS based on what was provided on the PTR form. Reviews service months in HR system. Populates leave balances with the hours they were eligible for when they transferred. Review the Sick Leave Credit Transfer Between WI Agencies for information about sick leave eligible to transfer from State agencies/authorities. 	
Benefit Plan	Information to Counsel Employee On	Action Employee Should Take
State Group Health Insurance	<ul style="list-style-type: none"> Employee may continue coverage if enrolled at transfer. There is no enrollment opportunity. If transfer results in residential move to another county, employee can change health plan carriers within 30 days from date of move. 	Employee needs to fill out application to continue coverage with the Universities of Wisconsin within 30 days of transfer.
Preventive Dental Insurance	<ul style="list-style-type: none"> Employee may continue coverage if enrolled at transfer. There is no enrollment opportunity. Remind employee to complete/update a beneficiary designation if enrolled in State Group Life Insurance and/or Accident Insurance (for AD&D provision) at transfer. 	Employee needs to fill out application to continue coverage with the Universities of Wisconsin within 30 days of transfer.
Supplemental Dental Insurance		
Vision Insurance		
State Group Life Insurance		
Accident Insurance		

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Benefit Plan	Information to Counsel Employee On	Action Employee Should Take
Individual & Family Life Insurance	<ul style="list-style-type: none"> Employee has an enrollment opportunity. Remind employee to complete a beneficiary designation if they enroll. 	Employee must fill out application to enroll within 30 days of transfer.
Accidental Death & Dismemberment Insurance	<ul style="list-style-type: none"> Employee has an enrollment opportunity. Remind employee to complete a beneficiary designation if they enroll. 	Employee may enroll at any time.
Flexible Spending Account (FSA)	<ul style="list-style-type: none"> Previous State agency will complete and send a Personnel Transfer Record (PTR) form as outlined in the FSA/HSA Transfer Process. UW-Shared Services, Service Operations, Benefits Service Delivery emails OFETSupport@optum.com to confirm the enrollments and year to date contribution information on the PTR form. Employee may only continue coverage they had in force at transfer. There is no enrollment opportunity. If enrolled in an HSA, remind employee of the following: <ul style="list-style-type: none"> They can change their HSA contribution amount at any time. They can update their HSA beneficiary designation at any time. 	<p>Employee needs to fill out application to continue coverage with the Universities of Wisconsin within 30 days of transfer.</p> <p>If transfer results in a move of residence and a change in day care cost or provider, employee has 30 days from the date of move to change their Dependent Day Care annual election amount.</p>
Health Savings Account (HSA)		

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Income Continuation Insurance	<ul style="list-style-type: none"> • Currently Enrolled: Employee may only continue coverage they had in force at transfer. <ul style="list-style-type: none"> ○ If transferring to a FA/AS/LI position must select an elimination period. ○ If transferring to a University Staff position and employee is enrolled in Category 2, 3, 4, 5 or 6 submit a request to UW-Shared Services, Service Operations to populate the correct eligibility for the ICI plan. If this is not done, when you get to the ICI enrollment box, it will not give you the proper category choice. • Not Currently Enrolled <ul style="list-style-type: none"> ○ If transferring to a FA/AS/LI position, employee has an enrollment opportunity (and if they enroll, they must select an elimination period). ○ If transferring to a University Staff position, employee does not have an enrollment opportunity. 	Employee needs to fill out application within 30 days of transfer to continue coverage or enroll if they have an enrollment opportunity with the Universities of Wisconsin.
Wisconsin Retirement System (WRS)	<ul style="list-style-type: none"> • Updated employee information (category) will be sent to ETF once it is entered into HR system. 	No action needed.
UW 403(b) Supplemental Retirement Program (SRP)	<ul style="list-style-type: none"> • Employee may enroll at any time. • Remind employee to complete a beneficiary designation if they enroll. 	Review UW 403(b) web page for information on the plan and how to enroll.
Wisconsin Deferred Compensation (WDC)	<ul style="list-style-type: none"> • Employee may enroll at any time. • WDC contributions will continue. 	<p>If employee was enrolled in WDC they should notify WDC they are now a Universities of Wisconsin employee.</p> <p>Employee can contact WDC to change their deferral election.</p>



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Benefit Plan	Information to Counsel Employee On
Leave Benefits	<p>Sick Leave - Review the Sick Leave Credit Transfer Between WI Agencies for information on sick leave eligible to be transferred from State agencies and State authorities.</p> <p>Vacation and banked leave hours may transfer. Accepting vacation and banked leave is at the discretion of the hiring authority. If hours are not accepted by the State agency, they will be paid out as a lump sum.</p> <p>Personal Holiday balances will be paid out as a lump sum.</p> <p>See UW System Administrative Policy 1286 Effect on WRS Service, Accrued Leave & Continuous Service When Moving To and From UW System Institutions or Agencies for more information on leave benefits transferring.</p>