

Transfer from a State Agency

Benefit Plan	Information	Action Employee Should Take
Personnel Transfer Record	Completed Personnel Transfer Record (PTR) forms must be provided to by the State agency after the employee's final payroll with the prior state agency calculates. PTRs should be sent to UW-Shared Services, Service Operations at serviceoperations@uwss.wisconsin.edu . Once the PTR is received, information on the benefits the employee is enrolled in is provided, applications can be provided/collected, and the employee's balances can be adjusted.	
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 State Group Health Insurance and Income Continuation Insurance will not process properly) 	
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. • If transfer results in move to another county, employee has 30 days from day of move to change health plan carriers. 	Employee needs to fill out application to continue coverage with UW System within 30 days of transfer.
Preventive Dental 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.
Supplemental Dental 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.
Vision 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.
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. • Remind employee to complete a beneficiary designation if they enroll. 	Employee must fill out application to enroll within 30 days of transfer.
UW Employees, Inc. 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.

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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.
University Insurance Association Life Insurance	<ul style="list-style-type: none"> If eligible, employee will automatically be enrolled January 1st. Remind employee to complete a beneficiary designation if they enroll. 	Inform employee about plan if they are eligible.
Accident Insurance	<ul style="list-style-type: none"> Employee may only continue coverage they had in force at transfer. There is no enrollment opportunity (Note: UW Hospital & Clinic employees who transfer to the UW System 1/1/2020 – 12/31/2021 have an enrollment opportunity. As of 1/1/2022 UW Hospitals & Clinics offers the Accident Plan, no enrollment opportunity.) Remind employee to complete a beneficiary designation if they enroll (for AD&D provisions in the plan). 	Employee must fill out application to enroll within 30 days of transfer.
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. Remind employee to update HSA beneficiary designation if enrolled in an HSA. 	Previous State agency will complete and send you a Personnel Transfer Record (PTR) form. As outlined in the FSA/HSA Transfer Process : Email etfsupport@connectyourcare.com to confirm the enrollment(s) and year to date contribution information on the form. Have the employee complete the applicable enrollment form(s). Enter the enrollment(s), annual election amount and year to date contributions into HRS.
Health Savings Account (HSA)		If transfer results in a move of residence, employee has 30 days from move to change their Dependent Day Care FSA annual election if the change in residence resulted in a change in cost or coverage of their dependent day care provider.

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Income Continuation Insurance	<ul style="list-style-type: none"> Employee may only continue coverage they had in force at transfer. Transfers do not create a new enrollment opportunity. Exception: Employees moving from a classified state position to a FA/AS/LI position (with limitations, see the ICI Administration Manual, chapter 207). If 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. 	Employee needs to fill out application to continue coverage or enroll if they have an enrollment opportunity with the UW System within 30 days of transfer.
Wisconsin Retirement System (WRS)	<ul style="list-style-type: none"> Updated employee information (category) will be sent to ETF after employee’s information is entered in HRS. 	No action needed.
UW 403(b) Supplemental Retirement Program (SRP)	<ul style="list-style-type: none"> Employee is eligible for the 403(b). Remind employee to complete a beneficiary designation if they enroll. 	Employee may enroll at any time.
Wisconsin Deferred Compensation (WDC)	<ul style="list-style-type: none"> Employee should notify WDC they are now a UW System employee – deductions will continue. The employee should work through WDC if they need to change their deferral election due to a change in payroll frequency. 	No action needed.
Paid Leave	Send a request to UW-Shared Services, Service Operations with a copy of the employee’s Personnel Transfer Record Form to request the employee’s leave balances be populated with the balances that were eligible for when they transferred. Review the Sick Leave Credit Transfer Between WI Agencies for information on sick leave that is eligible to be transferred from State agencies and State authorities.	