

Transfer from a State Agency

Benefit Plan	Information	Action Employee Should Take
Personnel Transfer Record	Personnel Transfer Record (PTR) form must be provided to you by State agency after the employee's final payroll with the prior state agency calculates. All fields must be completed on the form. Once you receive the PTR, you will know the benefits the employee is enrolled in and can adjust the employee's balances.	
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. 	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 plan carriers.
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 (I&F) 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 if they enroll.
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 if they enroll.
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 if they enroll.

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University Insurance Assoc. (UIA) Life Insurance	<ul style="list-style-type: none"> If eligible, employee will automatically be enrolled in October. 	<p>Inform employee about plan if they are eligible.</p> <p>Remind employee to fill out beneficiary designation when enrolled.</p>
Accident Insurance	<ul style="list-style-type: none"> Employee may only continue coverage they had in force at transfer. There is no enrollment opportunity (Exception: UW Hospital & Clinic employees who transfer to the UW System have an enrollment opportunity. UW Hospitals & Clinics does not offer the Accident Plan as of 1/1/2020.) 	<p>Employee needs to fill out application to continue coverage (or enroll for UW Hospital & Clinics employees) with UW System within 30 days of transfer.</p> <p>Remind employee to fill out beneficiary designation if they enroll.</p>
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. 	<p>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.</p> <p>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.</p> <p>Remind employee to update HSA beneficiary designation if enrolled in an HSA.</p>
Health Savings Account (HSA)		
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 request to the UW System Service Center 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. 	<p>Employee needs to fill out application to continue coverage with the UW System within 30 days of transfer.</p>
Wisconsin Retirement System (WRS)	<ul style="list-style-type: none"> No Change 	<p>No action needed.</p>

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UW Tax-Sheltered Annuity (TSA) 403(b)	<ul style="list-style-type: none"> Employee is now eligible for the TSA. 	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 the UW System Service Center AGs 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.	