



Transfer to a State Agency

When the transfer (termination) event is processed, UW-Shared Services, Service Operations will send a notice to the employee outlining their continuation or conversion rights for the benefits the employee is enrolled in at the time of transfer. Employee must contact UW-Shared Services, Service Operations to obtain continuation/conversion applications. Employee should submit completed continuation/conversion applications directly to the vendor(s).

Employee may maintain enrollment in most benefit plans (if offered at the new state agency) if they submit an application to the new state agency within 30 days of their start date.

Benefit Plan	Information	Action for UW-Shared Services, Service Operations Benefits Service Delivery
Job Data	<ul style="list-style-type: none"> As soon as HR or Benefits Administrator is made aware of employee transferring to another State agency, submit ticket to UW-Shared Services, Service Operations specifying the agency the employee is transferring to and the transfer date. Institution HR enters a termination reason of “Resign – To Other State Agency” in Job Data. After the termination event is processed in HR system, Benefits Service Delivery will confirm all coverage end dates are accurate (last day of the month following the transfer). 	
Transfer Record	A PTR form contains information about the benefits the employee is enrolled in through the Universities of Wisconsin.	Benefits Service Delivery completes a Personnel Transfer Record (PTR) Form and sends to state agency. All fields on the form are completed so employee can accurately be set up at the new agency. Benefits Service Delivery asks new state agency if they would like the employee’s personnel file and benefit file.
State Group Health Insurance, Dental Insurance, Vision Insurance, State Group Life Insurance, Individual & Family Life Insurance, Accidental Death & Dismemberment Insurance, Accident Insurance, Income Continuation Insurance		UW-Shared Services, Service Operations will send the employee a notice outlining their continuation or conversion rights.
Flexible Spending Account (FSA)	Employee can continue to submit eligible expenses for reimbursement to the plan administrator.	Benefits Service Delivery completes the Personnel Transfer Record (PTR) Form and sends to the new agency. Follow the additional instructions outlined in the FSA/HSA Transfer Process .
Health Savings Account (HSA)		
UW 403(b) Supplemental Retirement Program (SRP)	Employee will need to contact recordkeeper(s) for options upon termination of employment.	No action needed.
Wisconsin Deferred Compensation (WDC)	Employee must inform WDC of their new employer.	No action needed.

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Paid Leave	Once transfer record is complete and sent to new state agency, UW-Shared Services, Service Operations zeros employee's sick leave and vacation balances if transferred to state agency.	<p>UW-Shared Services, Service Operations zeros out leave balances as applicable.</p> <p>Personal Holiday - Balances are paid out as lump sum (UW-Shared Services completes for all campuses except UW-Madison, UW-Milwaukee, UW-Stout). Refer to UW System Administrative Policy 1211 (formerly BN 2) Personal Holiday, section 4.A.(4)c. Personal Holiday Credits upon Retirement, Layoff, Termination, or Movement to Another Appointment.</p> <p>Sick Leave – Sick leave earned as a Universities of Wisconsin employee will transfer to a State of Wisconsin agency. Refer to UW System Administrative Policy 1212 (formerly BN 3) Sick Leave, section 4.D. Sick Leave at Movement to another Position at UW or State Agency and Termination. Sick leave earned as a Universities of Wisconsin employee is not eligible to be transferred to State authorities. Review the Sick Leave Credit Transfer Between WI Agencies for more information.</p> <p>Vacation - If new State agency does not accept vacation and/or banked leave/ALRA balances, balances will be paid out before the transfer (UW-Shared Services completes for all campuses except UW-Madison, UW-Milwaukee, UW-Stout). Refer to UW System Administrative Policy 1210 (formerly BN 1) Vacation, Paid Leave Banks, and Vacation Cash Payouts, section 4.F.6.a. Movement to Another State of Wisconsin Agency.</p>