

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 for copies of continuation/and or conversion applications. Employees should submit completed continuation/conversion applications directly to the vendor(s).

Employee may maintain enrollment in most of the 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 to Take
Job Data	Employees transferring to a state agency should have a termination reason of “Resign – To Other State Agency” entered in Job Data. All coverage with the UW System will end at the end of month of transfer. Must CONFIRM ALL BENEFITS TERMINATION END DATES ARE CORRECT ONCE TERM EVENT PROCESSES. If any end dates are not correct, submit a ticket to UW-Shared Services, Service Operations to correct them.	
Transfer Record	Personnel Transfer Record (PTR) Form must be completed and sent to new State agency once final payroll calculates at UW System.	Complete a Personnel Transfer Record (PTR) Form (all fields on the form must be provided so employee can accurately be set up at the new agency) and send to the new agency. Ask new state agency if they would like the employee’s personnel file and benefit file.
State Group Health Insurance, Preventive Dental Insurance, Supplemental Dental Insurance, Vision Insurance, State Group Life Insurance, Individual & Family Life Insurance, UW Employees, Inc. Life Insurance, Accidental Death & Dismemberment Insurance, University Insurance Association Life Insurance, Accident Insurance, Income Continuation Insurance		No action needed. 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 to the plan administrator.	Complete the Personnel Transfer Record (PTR) Form and send to the new agency. For FSA and HSA 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 UW System employment.	No action needed.
Wisconsin Deferred Compensation (WDC)	Employee must inform WDC of their new employer.	No action needed.

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<p>Paid Leave</p>	<p>Once transfer record is completed and sent to new state agency, employee's sick leave and vacation balances need to be zeroed out if the leave was transferred to the State Agency.</p>	<p>Send a request to the UW-Shared Services, Service Operations to zero out leave balances.</p> <p>Personal Holiday - Balances should be paid out as a lump sum. 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 UW System 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 UW System 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 the new State agency does not accept vacation and/or banked leave/ALRA balances, these balances will need to be paid out before the transfer. 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>
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