

The University of Wisconsin System

UPS OPERATIONAL POLICY: TR 2



SUBJECT: Effect on WRS Service, Accrued
Leave & Continuous Service When Moving
To and From UW System Institutions or Agencies

Original Issuance Date: July 1, 2015
Last Revision Date:

1. POLICY PURPOSE:

The purpose of this policy is to establish how Wisconsin Retirement System (WRS) service credits, accrued leave, and continuous service are administered when an employee of any UW System institution (including UW-Madison, with regard to this policy) moves to a new position at a different UW System institution (including UW-Madison) or State of Wisconsin agency. This policy also establishes how WRS service credits, accumulated leave, and continuous service are administered when an employee of a State of Wisconsin agency moves to a position at a UW System institution (including UW-Madison).

2. POLICY BACKGROUND:

Wisconsin Retirement System (WRS) eligibility, creditable service and administration are provided for in [Wis. Stat. Chapter 40](#) and the administrative rules set forth by the Department of Employee Trust Funds (ETF). All UW System employees are subject to these statutory provisions and rules.

Prior to July 1, 2015, the treatment of accrued paid leave benefits (sick leave, vacation, personal and legal holiday, and sabbatical) for classified employees (university staff effective July 1, 2015) who move to or from different State of Wisconsin agencies or UW institutions, and continuous service, was provided for in [Wis. Stat. Chapter 230](#) and [Wis. Admin. Code Chapter ER 18](#).

Effective July 1, 2015, these provisions will be provided for in this policy and the following UPS Operational Policies:

- [BN 1: Vacation, Paid Leave Banks, and Vacation Cash Payouts](#)
- [BN 2: Personal Holiday and Legal Holiday Administration](#)
- [BN 3: Sick Leave](#)

3. POLICY DEFINITIONS:

Please see UPS Operational Policy [GEN 0: General Terms and Definitions](#) for a list of general terms and definitions.

“Accrued leave” means the amount of sick leave, vacation, vacation carryover, personal holiday, legal holiday and banked leave an employee has earned based on the number of hours in pay status.

“WRS creditable service” means the amount of service an employee is granted under the Wisconsin Retirement System based on the number of hours worked in a year and the employee’s WRS employment category.

4. POLICY:

A. Wisconsin Retirement System (WRS)

- (1) All UW System institution employees are considered state employees and are subject to the Wisconsin Retirement System (WRS) guidelines provided for in [Wis. Stat. Chapter 40](#), and the administrative rules set forth by the Department of Employee Trust Funds. All UW System institutions (including UW-Madison) are considered one employer under the WRS. All eligible employment positions will be considered together when evaluating an employee for WRS eligibility. WRS eligibility and creditable service is not affected when a UW System employee moves to or from eligible employee classifications at the same or different UW System institution (including UW-Madison).
- (2) Accumulated WRS creditable service is not affected when an employee moves to or from another State of Wisconsin agency or State of Wisconsin local governmental employer. WRS creditable service credits earned at any WRS-covered employer remain in an employee’s individual WRS account when the employee moves to another employer, provided the employee does not close his or her WRS account by taking a WRS separation, disability, or retirement benefit.
- (3) The Department of Employee Trust Funds sets the annual employer and employee WRS contribution amounts.

B. Sick Leave

Sick leave for UW System employees is provided for in UPS Operational Policy [BN 3: Sick Leave](#). Below is a summary of sick leave provisions upon movement to another position with no break in employment.

- (1) When a UW System employee moves to a sick-leave eligible position within the same or different UW System institution (including UW-Madison) or State of Wisconsin agency, accumulated sick leave will transfer to the new position.
- (2) When an employee of a State of Wisconsin agency moves to a sick-leave eligible position at a UW System institution (including UW-Madison), accumulated sick leave will transfer to the new position.

C. Vacation, Vacation Carryover, and Banked Vacation

All provisions related to vacation are provided for in [Operational Policy BN 1: Vacation, Paid Leave Banks, and Vacation Cash Payouts](#). Below is a summary of vacation provisions upon movement to another vacation-eligible position with no break in employment

- (1) **Movement to Another State of Wisconsin Agency:** When an employee moves to another State of Wisconsin agency, the movement of currently earned vacation, vacation carryover and banked leave is at the discretion of the hiring agency. Any leave that is not accepted by the agency will be paid to the employee as a lump sum on his/her final check.
- (2) **Movement to Another UW System Appointment:** When an employee moves from one UW System institution to another or moves to a different appointment within the same UW institution, any current vacation earned during the calendar or fiscal year shall transfer to the new leave-eligible appointment. The new hiring authority will determine if vacation carried over from a prior year and/or banked leave hours will be transferred to the new appointment. Any leave not accepted by the hiring institution or agency shall be paid to the employee as a lump sum.

D. Personal Holiday

All provisions related to personal holiday are provided for in UPS Operational Policy [BN 2: Personal Holiday and Legal Holiday Administration](#). Below is a summary of personal holiday provisions upon movement to another position with no break in employment.

- (1) When a UW System employee moves to a personal holiday-eligible position at the same or different UW institution (including UW-Madison), remaining personal holiday will transfer to the new position.
- (2) When an employee moves to another State of Wisconsin agency, remaining personal holiday will be paid to the employee as a lump sum.

E. Continuous Service

Below is a summary of continuous service provisions upon movement to another position with no break in employment.

- (1) Time worked in a leave-eligible position at a UW System institution (including UW-Madison) counts towards an employee's continuous service date if the employee moves to a State of Wisconsin agency or another UW System institution.

5. RELATED DOCUMENTS:

[Operational Policy BN 1: Vacation, Paid Leave Banks, and Vacation Cash Payouts](#)

[Operational Policy BN 2: Personal Holiday and Legal Holiday](#)

[Operational Policy BN 3: Sick Leave](#)

Wis. Stat. Chapter [40, Public Employee Trust Fund](#)

6. POLICY HISTORY:

Wis. Stat. § [230.35, State office hours; standard workweek; leaves of absence; holidays.](#)

Wis. Admin. Code Chapter [ER 18, Absences](#)

University Personnel Guideline [#9: Unclassified Staff Paid Vacation, Holiday, and Catastrophic Leave Policy](#)

University Personnel Guideline [#10: Unclassified Sick Leave Policy](#)