**COUNSELING EMPLOYEE NAME:**

**COUNSELOR NAME**:       **COUNSELING DATE**:

**Job Information**

[ ]  New appointment type (AS or LI):

[ ]  New AS contract type (fixed term, multi-year fixed term, probationary):

[ ]  New title:

[ ]  New monthly wage rate:

[ ]  No right to collectively bargain

[ ]  Once reassigned, may not return to FLSA exempt university staff position

[ ]  Reassignment effective date (1st of the month after signed agreement of voluntary reassignment):

[ ]  Last University Staff pay date:       First AS/LI pay date:

* Discuss new payroll schedule. See election month calendars for exact detail.

**Job Security**

[ ]  Explain the type of academic staff (fixed term or probationary) the person will have and the contract notification “notice” process.

[ ]  Provide copy of local Academic Staff Personnel Rules.

[ ]  Explain the limited appointee “at will” appointment and the concurrent appointment (if applicable). Share any local documents that deal with limited appointees.

**Benefits**

[ ]  Income Continuation Insurance

[ ]  If currently enrolled in Classified/University Staff ICI program, employee must submit application to enroll in Unclassified ICI program within 30 days of reassignment or coverage will lapse.

[ ]  If not currently enrolled in Classified/University Staff ICI program, employee may have an enrollment opportunity. Employee must submit an application within 30 days of reassignment. Classified/University Staff sick leave balance will affect which elimination category the employee can enroll in. See ICI manual, page 10-11 of Chapter 2 for more information.

[ ]  Explain the University Insurance Association Life Insurance Plan – remind employee to fill out a beneficiary designation form.

[ ]  Is employee enrolled in Wisconsin Deferred Comp or Tax-sheltered Annuity program?

* WDC – if employee would like to adjust their paycheck deduction to reflect new number of pay periods, they must do so through WDC directly.
* TSA – if employee would like to adjust their paycheck deduction to reflect the new number of pay periods, they must complete a new Salary Reduction Agreement and submit to their payroll office.

[ ]  Is employee 50 years of age or older? If yes, counsel on the impact reassignment could have on their three highest years of wages for retirement purposes.

[ ]  If employee is enrolled in a TASC program (FSA/LPFSA/HSA/Parking/Transit) and making contributions, explain that the paycheck deduction will automatically adjusted to reflect the new number of pay periods. FSA: mployee will receive a new TASC card/account.

**Leave**

[ ]  Review and discuss new leave earning schedules for Vacation, Sick Leave, ALRA

[ ]  Leave will be earned on a Fiscal Year basis instead of Calendar Year – discuss new deadlines for expiring leave

[ ]  All current leave will transfer to new position providing it does not exceed any of the caps. If caps are exceeded, employee will need to be paid out.

[ ]  AS/LI leave reporting procedures

**Taxes**

[ ]  Discuss any potential changes in tax withholding e.g., additional withholding or exemptions.

**ACTION NEEDED**

[ ]  Enter reassignment in Job Data with reassignment effective date (1st of the month after signed agreement of voluntary reassignment)

[ ]  Determine leave transfer/pay outs and complete the Voluntary Movement Absence Worksheet

[ ]  Personal Holiday

* If reassignment to AS/LI is effective on January 2 - June 30, employee will not be granted a new personal holiday allocation and any unused personal holiday from CP/US position will be transferred to AS/LI position. These hours will expire on June 30th following the date of reassignment.
* If reassignment to AS/LI is effective on July 1 - January 1, employee will be granted a new 36 PH allocation and any unused PH from CP/US position should be paid out on employee’s last bi-weekly paycheck.

[ ]  Vacation

* To determine vacation balances or payouts, follow below formula:

US Vacation Carryover + US Vacation + AS/LI Vacation Entitlement 🡪 AS/LI Vacation – if this combination of hours exceeds 176 hours, transfer remaining hours into AS/LI Vacation Carryover up to 176 hours. If hours are still remaining, payout must be performed.

I.e. US Vacation Carryover = 100 hours, US Vacation = 108 hours, AS/LI Vacation Entitlement = 176 hours

100 + 108 + 176 = 384 – AS/LI Vacation Entitlement is already maxed out at 176 hours, transfer 176 hours into AS/LI Vacation Carryover, 32 hours still remain. Pay out 32 hours of US Vacation Carryover on last bi-weekly paycheck.

* If employee has overused US Vacation as of the reassignment date, you must transfer the negative balance to the AS/LI Vacation bucket.

[ ]  Comp Time

* Pay out any comp time on last bi-weekly paycheck. Comp time may not carry forward.

[ ]  Print copy of leave balances after final University Staff payroll has confirmed to monitor the transfer of leave balances

[ ]  Adjust any General Deductions (parking, gym fees, partners in giving donation, etc.) to reflect the monthly payroll instead of bi-weekly. See UW Service Center General Deductions processing instructions.

[ ]  Monitor last bi-weekly paycheck and first monthly paycheck to ensure employee does not overpay benefit premiums. WiscIT may be required to stop premium deductions on monthly paycheck if employee has already paid on bi-weekly paycheck.

[ ]  If employee is enrolled in any TASC programs (FSA/LPFSA/HSA/Parking/Transit) – Complete TASC Transfer Form since employee is changing payroll frequencies.

[ ]  MSC Event to change the employee’s benefit program from Classified to Unclassified will waive the employee from the FSA/LPFSA/HSA plans. Make sure to re-enroll the employee in these plans (if applicable) to ensure deductions resume.