

Instructions on how to handle payroll transfer with ConnectYourCare

Payroll Center A = refers to the previous payroll center the participant is from

Payroll Center B = refers to the new payroll center the participant is transferring to

Steps to Take

1. Payroll Center A submits term record on the census file and cancellation record on the enrollment file one time only to ConnectYourCare (CYC). Additional term/cancellation records for the same employee on future files from Payroll Center A will prevent the transfer processing from working properly.
2. Payroll Center A submits a [Personnel Transfer Record \(PTR\)](#) to the new agency that the employee is transferring to.

STATE OF WISCONSIN
DEPARTMENT OF ADMINISTRATION
DIVISION OF PERSONNEL MANAGEMENT
DOA-15504 (R03/2019)



PERSONNEL TRANSFER RECORD

When an employee transfers to another state agency, complete this form on the last day of employment. Send one copy immediately to the Payroll Representative of the other agency.

☐ TRANSFER

TO: AGENCY NAME	AGENCY NUMBER:	SECONDARY LEVEL NAME:	ADDRESS:
FROM: AGENCY NAME	AGENCY NUMBER:	SECONDARY LEVEL NAME:	ADDRESS:
PERSON COMPLETING FORM:		TELEPHONE NUMBER:	DATE (MM/DD/YYYY):
1. EMPLOYEE DATA			
NAME:	LAST 4 # OF SSN:	BIRTHDATE:	GEN ^{DF} R: <input type="radio"/> Male <input type="radio"/> Female
PRESENT CLASSIFICATION:		CLASS CODE:	EMPLOYEE ID
SCHEDULE, RANGE & EEO:		HOURLY SALARY:	
SUPP'L ADD ON:	START DATE CONTINUOUS SERVICE:	ADJUSTED DATE:	LAST DAY ON PAYROLL:
PAYROLL SYSTEM: <input type="checkbox"/> CENTRAL PAYROLL <input type="checkbox"/> UW <input type="checkbox"/> UWHC <input type="checkbox"/> LEGISLATIVE <input type="checkbox"/> WISCONSIN COURTS <input type="checkbox"/> WHEDA <input type="checkbox"/> WEDC <input type="checkbox"/> AUDIT BUREAU			

3. Payroll Center B HR/Payroll/Benefit Staff should reach out to etfsupport@connectyourcare.com to confirm the enrollment information that Payroll Center A provided to CYC such as coverage type(s), annual election amount(s), and remaining contributions for the participant. Payroll Center B records the remaining contribution amounts on the form as "Annual Employee or Employer Contributions. All transferring enrollment elections must be sent to CYC by Payroll Center B on the enrollment file, in addition to adding the employee to the census file.
4. Payroll Center B provides the applicable enrollment form(s) to the employee to review and complete.
 - a. [HSA Enrollment Form](#)
 - b. [ERA Enrollment Form](#) (includes FSA, Dependent Day Care Account, and Commuter Elections)

Note: If the employee is eligible to transfer benefits coverage over to the new agency, Payroll Center B should have the employee complete any applicable enrollment forms.

If Payroll Center B does not accept a benefit coverage type (such as commuter fringe benefit from Central to UW System), the applicable benefit(s) will be terminated with Payroll Center A. Payroll Center B can only offer new benefits to the employee if it was not offered to the employee at Payroll Center A.



Employee Reimbursement Accounts Enrollment Form



Form Instructions: Please complete all entries on this form. Please print, sign and date this form, and submit to your Employer Benefits Specialist or Payroll Benefits Staff.

STEP 1: Enrollee Personal Information			
First Name:		Last Name:	
Employer Name:		Employee ID:	
Permanent Address:		City:	State:
Day Time Phone Number:		Zip Code:	
Social Security Number:		Email Address:	
Date of Birth: (Month/Day/Year)			
Marital Status: <input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Divorced <input type="checkbox"/> Widowed		Enrollment Status: <input type="checkbox"/> New enrollment <input type="checkbox"/> Re-enrollment	

- Payroll Center B enters the benefit enrollment and contribution elections into their payroll system once the forms have been received and verified.
- Census and Enrollment data should be sent on the next weekly files by Payroll Center B. The files will override the previous payroll center which allows the employee to be listed under Payroll Center B.

****Note:** If the total annual election amount under Payroll Center B is less than the amount for Payroll Center A, CYC's system will ignore the total annual election from Payroll Center B if the updated record is processed by CYC within 14 days from the termination occurring under Payroll Center A; thus, allowing continued coverage without overriding the true total annual election amount. To ensure this process is managed appropriately, it is important timely census and enrollment information is passed to CYC by both Payroll Center A and Payroll Center B.