

University of Wisconsin

BENEFIT ELIGIBILITY DECISION TABLE

This Decision Table is to be used to determine UW Benefits a **new** employee is eligible for based on the employee's appointment(s).

This Decision Table **SHOULD NOT** be used in determining benefit eligibility in the following cases:

- if an employee had been in UW employment before
- if an employee had been in UW employment within the past 12 months and covered by Wisconsin Retirement System (WRS);
- if an employee had previous service covered by another employer that participates in the Wisconsin Retirement System
- if an employee is a rehired annuitant who opts to discontinue their annuity while working

Previous service covered by the Wisconsin Retirement System can be validated by looking at the Department of Employee Trust Funds WRS Extranet. For Madison departments and divisions this information can be obtained by calling the main Payroll and Benefit Office or sending an email to: Benefits@ohr.wisc.edu

How to use this chart:

1. Identify the **Appointment Type** from the appointment system and match to the Appointment Type in the left column of the matrix. Appointment types are defined below:

FA = Faculty	LI = Limited	SA = Student Assistant	CJ = Classified Project
AS = Academic Staff	OT = Other	ET = Employee-in-Training	CL = Classified Limited Term
Rehired Annuitant	SH = Student Help	CP = Classified Permanent	

2. Determine **Appointment Title** from the appointment system and then determine which Title Group applies.

BENEFIT ELIGIBILITY DECISION TABLE (cont.)

How to use this chart (cont):

3. **Determine employee’s salary basis, appointment percentage, continuity status and duration** from the appointment system and correlate that information to the information in this table.

The chart uses Continuity Status for unclassified appointments. Definitions are below. For more information, see the Unclassified Title Guidelines at: <http://www.ohr.wisc.edu/polproced/UTG/utg.html>

01 - Ongoing	02 - Fixed Terminal	03 - Fixed Renewable	04 - Limited
05 - Acting/Provisional	06 Rolling Horizon	07 – Interim (Not UW Madison)	

Symbol	Meaning
<	Less Than
≤	Less Than or Equal To
>	Greater Than
≥	Greater Than or Equal To

Eligibility for Fellows, Advanced Opportunity Fellows, Scholars, and Trainees is based on earnings ≥ 33% of research assistant C basis salary. For more information see salary ranges for unclassified staff at: <http://www.ohr.wisc.edu/polproced/UTG/SalRng.html#stuasst>

4. Determine **benefit program** the employee is eligible to enroll in. Read the Table left to right to determine the benefit program(s) the employee is eligible to enroll in. If there is a “Y” in the benefit plan column, the employee is eligible; if there is an “N” in this column, the employee is not eligible. The benefit program abbreviations are spelled out below.

WRS = Wisconsin Retirement System
SGH Reg = Regular Health Insurance
SGH Grad = Graduate Assistant Health Insurance
ICI Unc = Unclassified Income Continuation Insurance
SGL - State Group Life Insurance
Ind & Fam Life = Individual & Family Group Life Insurance
UW Empl Inc = UW Employees Inc. Life Insurance
Den & Ex Med = Dental & Excess Medical (EPIC)

UIA = University Insurance Association Life Insurance
AD&D = Accidental Death and Dismemberment
Dental - Represented & Non-Represented Dental
TSA = Tax Shelter Annuity
WDC = Wisconsin Deferred Compensation
LTC = Long Term Care Insurance
Vision = Vision Insurance
ERA - Employee Reimbursement Account

BENEFIT ELIGIBILITY DECISION TABLE (cont.)

5. **Calculation of appointment percentages:** The chart uses appointment percentages for eligibility. The percents were calculated based on the following:

- ◆ WRS participation requires an employee to work 1/3 of full-time. Full-time requires 1,320 hours in a calendar year for one year of WRS service credit as a teacher. Unclassified employees are in the teacher employment category. Therefore 1/3 of full-time is 440 hours. The following examples show how the required numbers of hours are calculated for an unclassified employee who is appointed on an academic year appointment (C-Basis) and an unclassified employee who is appointed on an annual year appointment (A-Basis).

Note: 174 hours per month is used for calculation of appointment percentage and sick leave conversion value; 176 hours per month is used for calculation of WRS service credit. See Financial and Administrative Policies: <http://www.uwsa.edu/fadmin/fppp/fppp29.htm>

- ◆ C-Basis appointments must be 28% or greater to meet the 1/3 of WRS full-time. There are 2,088 work hours in a calendar year, or 174 per month. Therefore, a C-Basis employee who works 9 months will work 1,566 hours (9 times 174). The percentage of full-time is calculated as follows: 1,320 divided by 3 = 440 hours and the 440 hours is divided by 1,566 to arrive at 28% as being the appointment percent equal to 1/3 of full-time.
- ◆ A-Basis appointments must be 21% or greater to meet the 1/3 of WRS full-time. There are 2,088 work hours in a calendar year or 174 per month. The percentage of full-time is calculated as follows: 1,320 divided by 3 = 440 hours and the 440 hours is divided by 2,088 to arrive at 21% as being the appointment percent equal to 1/3 of full-time.
- ◆ Student Assistants and Employees-in-Training are NOT covered by WRS. To be eligible for the Graduate Assistant health insurance plan in accordance with Sec. 40.02 (25) of the Wisconsin Statutes, they are required to have an appointment of at least 1/3 of full-time. The Board of Regents in 1973 defined 1/3 of full-time as 33% or greater.

6. **Adding Appointment Percentages together:** when using this chart, two appointments with different percentages can be added together to make the employee eligible if the two appointments would be eligible for WRS or if the two appointments are Graduate Assistants. You cannot add WRS and Graduate Assistant appointment information together for eligibility.

- Example: Classified Permanent Appointment of 20% can be added to an Academic Staff Appointment of 30% since both appointments could be WRS eligible. Student Assistant Appointment of 25% can be added to another Student Assistant Appointment of 6% to make the required 33% since both appointments are SA.

Appointment Eligibility Criteria	PLANS														
	WRS	SGH Reg	SGH Grad	ICI Unclass	ICI Class	SGL	Ind & Fam Life	UW Empl Inc	Den & Ex Med	UIA	AD &D	Dental Rep & Non-Rep	TSA WDC LTC	Vision	ERA
1. Appointment Type = FA (Faculty) and duration ≥ 1 academic year with expectation of returning following year	Y	Y	N	Y	N	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
2. Appointment Type = AS or LI (Academic Staff or Limited)															
A. Appt Title is not 'Visiting' (Title Code does not begin with D11,D12, D13, D14, D81 or E11)															
I. Salary Basis is C															
a. sum of Appt Dept % ≥ 28															
i. Continuity Status = 01, 03, 04 or 06	Y	Y	N	Y	N	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
ii. Continuity Status = 02, 05 or 07 and duration ≥ 1 semester and ≤ 1 academic year	N	N	Y	N	N	N	Y	Y	Y	Y	Y	Y	Y	Y	Y
iii. Continuity Status = 02, 05 or 07 and duration ≥ 1 academic year with expectation of returning the following year	Y	Y	N	Y	N	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
b. Otherwise if other % or duration	N	N	N	N	N	N	N	N	N	Y	N	N	Y	N	Y
II. Salary basis is A or H															
a. sum of Appt Dept % ≥ 21															
i. Continuity Status = 01,03, 04,06	Y	Y	N	Y	N	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
ii. Continuity Status = 02, 05 or 07 and duration ≥ 6 months and < 12 months	N	N	Y	N	N	N	Y	Y	Y	Y	Y	Y	Y	Y	Y
iii. Continuity Status = 02, 05 or 07 and duration ≥ 12 months	Y	Y	N	Y	N	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
b. Otherwise if other % or duration	N	N	N	N	N	N	N	N	N	Y	N	N	Y	N	Y
III. Salary basis is L	N	N	N	N	N	N	N	N	N	Y	N	N	Y	N	Y

Appointment Eligibility Criteria	PLANS														
	WRS	SGH Reg	SGH Grad	ICI Unclass	ICI Class	SGL	Ind & Fam Life	UW Empl Inc	Den & Ex Med	UIA	AD &D	Dental Rep & Non-Rep	TSA WDC LTC	Vision	ERA
B. Appt Title is 'Visiting' (Title Code begins with D11, D12, D13, D14, D81 or E11)															
I. Salary Basis is C															
a. sum of Appt Dept % \geq 28															
i. Duration \geq 1 semester and \leq 1 academic year (disregard leave status from other institution)	N	N	Y	N	N	N	Y	Y	Y	Y	Y	Y	Y	Y	Y
ii. Duration \geq 1 academic year and on LOA from another educational institution - WRS begins the 13th month	N	Y	N	N	N	N	Y	Y	Y	Y	Y	Y	Y	Y	Y
iii. Duration \geq 1 academic year and NOT on LOA from another educational institution with expectation of returning the following year	Y	Y	N	Y	N	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
b. Otherwise if other % or duration	N	N	N	N	N	N	N	N	N	Y	N	N	Y	N	Y
II. Salary Basis is A															
a. sum of Appt Dept % \geq 21															
i. Duration $>$ 6 months and $<$ 12 months (disregard leave status from other institution)	N	N	Y	N	N	N	Y	Y	Y	Y	Y	Y	Y	Y	Y
ii. Duration \geq 12 mos. and on LOA from another educational institution - WRS begins the 13th month	N	Y	N	N	N	N	Y	Y	Y	Y	Y	Y	Y	Y	Y
iii. Duration \geq 12 mos. and NOT on LOA from another educational institution	Y	Y	N	Y	N	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
b. Otherwise if other % of duration	N	N	N	N	N	N	N	N	N	Y	N	N	Y	N	Y
III. Other Salary Basis (visiting titles)	N	N	N	N	N	N	N	N	N	Y	N	N	Y	N	Y

Appointment Eligibility Criteria	PLANS														
	WRS	SGH Reg	SGH Grad	ICI Unclass	ICI Class	SGL	Ind & Fam Life	UW Empl Inc	Den & Ex Med	UIA	AD &D	Dental Rep & Non-Rep	TSA WDC LTC	Vision	ERA
3. Other Appointment Type = OT (Other)															
A. Ad Hoc Program Specialist (Z91NN)															
I. Salary Basis is C															
a. sum of Appt Dept % \geq 28															
i. Continuity Status = 01, 03, 04, 06	Y	Y	N	Y	N	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
ii. Continuity Status = 02, 05 or 07 and duration \geq 1 semester and \leq 1 academic year	N	N	Y	N	N	N	Y	Y	Y	Y	Y	Y	Y	Y	Y
iii. Continuity Status = 02, 05 or 07 and duration \geq 1 academic year with expectation of returning the following year	Y	Y	N	Y	N	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
b. Otherwise if other % or duration	N	N	N	N	N	N	N	N	N	Y	N	N	Y	N	Y
II. Salary Basis is A or H															
a. sum of Appt Dept % \geq 21															
i. Continuity Status = 01,03, 04, 06	Y	Y	N	Y	N	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
ii. Continuity Status = 02, 05 or 07 and duration \geq 6 months and $<$ 12 months	N	N	Y	N	N	N	Y	Y	Y	Y	Y	Y	Y	Y	Y
iii. Continuity Status = 02, 05 or 07 and duration \geq 12 months	Y	Y	N	Y	N	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
b. Otherwise if other % or duration	N	N	N	N	N	N	N	N	N	Y	N	N	Y	N	Y
B. Appt Title is Teaching Supervisor (Z50NN)	N	N	N	N	N	N	N	N	N	N	N	N	Y	N	Y

Appointment Eligibility Criteria	PLANS														
	WRS	SGH Reg	SGH Grad	ICI Unclass	ICI Class	SGL	Ind & Fam Life	UW Empl Inc	Den & Ex Med	UIA	AD &D	Dental Rep & Non-Rep	TSA WDC LTC	Vision	ERA
4. Appointment Type = SA (Student Assistant)															
A. Appt Title is Research Assistant (Y41NN)															
I. Salary Basis is C and sum of Appt Dept % \geq 33 % and duration \geq 1 semester	N	N	Y	N	N	N	Y	Y	Y	N	Y	Y	N	Y	N
II. Salary Basis is A and sum of Appt Dept % \geq 33 % and duration \geq 6 months	N	N	Y	N	N	N	Y	Y	Y	N	Y	Y	N	Y	N
III. Otherwise if other % or duration or basis	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
B. Appt Title is Fellow (Y21NN), Advanced Opportunity Fellow (Y26NN), Scholar (Y22NN) or Trainee (Y23NN)															
I. Salary Basis is C and Salary Rate \geq 33 % x Res. Asst. C Basis Salary Rate and duration \geq 1 semester	N	N	Y	N	N	N	Y	Y	Y	N	Y	Y	N	Y	N
II. Salary Basis is A and Salary Rate \geq 33 % x Res. Asst. A Salary Basis Rate and duration \geq 6 months	N	N	Y	N	N	N	Y	Y	Y	N	Y	Y	N	Y	N
III. Otherwise if other % or duration or basis	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
C. Appt Title Is Housefellow/Resident Assistant (Y80NN)	N	N	N	N	N	N	N	N	N	N	N	N	Y	N	Y
D. Appt Title Is Undergrad Asst. (Y51NN) or Undergrad Intern (Y52NN)	N	N	N	N	N	N	N	N	N	N	N	N	Y	N	Y
E. Appt Title Is Teaching Asst. (Y31NN, Y32NN or Y33NN)															
I. Represented (Major Dept begins with A, B or T)															
a. sum of Appt Dept% \geq 33% and duration \geq 1 semester	N	N	Y	N	N	N	Y	Y	Y	N	Y	Y	Y	Y	Y
b. Otherwise if other % or duration	N	N	N	N	N	N	N	N	N	N	N	N	Y	N	Y
II. Non-Represented															
a. sum of Appt Dept% \geq 33% and duration \geq 1 semester	N	N	Y	N	N	N	Y	Y	Y	N	Y	Y	Y	Y	Y
b. Otherwise if other % or duration	N	N	N	N	N	N	N	N	N	N	N	N	Y	N	Y

Appointment Eligibility Criteria	PLANS														
	WRS	SGH Reg	SGH Grad	ICI Unclass	ICI Class	SGL	Ind & Fam Life	UW Empl Inc	Den & Ex Med	UIA	AD &D	Dental Rep & Non-Rep	TSA WDC LTC	Vision	ERA
F. Appt Title is Project Asst. or Program Asst. (title codes begin with Y42 or Y43)															
I. If Salary Basis is A or H															
a. sum of Appt Dept % ≥ 33%															
i. Duration ≥ 6 months															
1) Represented (Maj Dept begins with A, B or T)	N	N	Y	N	N	N	Y	Y	Y	N	Y	Y	Y	Y	Y
2) Non-Represented	N	N	Y	N	N	N	Y	Y	Y	N	Y	Y	Y	Y	Y
b. sum of Appt Dept % ≥ 33%															
i. Duration ≥ 1 Semester															
1) Represented (Maj Dept begins with A, or T)	N	N	Y	N	N	N	Y	Y	Y	N	Y	Y	Y	Y	Y
2) Non-Represented	N	N	Y	N	N	N	Y	Y	Y	N	Y	Y	Y	Y	Y
c. Otherwise if other % or duration															
1) Represented	N	N	N	N	N	N	N	N	N	N	N	N	Y	N	Y
2) Non-Represented	N	N	N	N	N	N	N	N	N	N	N	N	Y	N	Y
II. If Salary Basis is C and Maj Dept does not begin with A or T															
a. sum of Appt Dept % ≥ 33 and Duration is ≥ 1 semester															
1) Represented (Maj Dept begins with B)	N	N	Y	N	N	N	Y	Y	Y	N	Y	Y	Y	Y	Y
2) Non- Represented	N	N	Y	N	N	N	Y	Y	Y	N	Y	Y	Y	Y	Y
b. otherwise if other % or duration															
1) Represented	N	N	N	N	N	N	N	N	N	N	N	N	Y	N	Y
2) Non-Represented	N	N	N	N	N	N	N	N	N	N	N	N	Y	N	Y
G. Other SA Appt Titles															
I. Salary Basis is C and sum of Appt Dept % ≥ 33 and duration ≥ 1 semester	N	N	Y	N	N	N	Y	Y	Y	N	Y	Y	Y	Y	Y
II. Salary Basis is A and sum of Appt Dept % ≥ 33 and duration ≥ 6 months	N	N	Y	N	N	N	Y	Y	Y	N	Y	Y	Y	Y	Y
III. Otherwise if other % or duration or basis	N	N	N	N	N	N	N	N	N	N	N	N	Y	N	Y
5. Appointment Type = ET (Employee-in-Training)															
A. Appt Title is Grad Intern/Trainee, Post Doc Fellow, Post Doc Trainee															
I. Salary Basis is C and sum of Appt Dept % ≥ 33 and duration ≥ 1 semester	N	N	Y	N	N	N	Y	Y	Y	N	Y	Y	N	Y	N

Appointment Eligibility Criteria	PLANS														
	WRS	SGH Reg	SGH Grad	ICI Unclass	ICI Class	SGL	Ind & Fam Life	UW Empl Inc	Den & Ex Med	UIA	AD &D	Dental Rep & Non-Rep	TSA WDC LTC	Vision	ERA
II. Salary Basis is A and sum of Appt Dept % \geq 33 and duration \geq 6 months	N	N	Y	N	N	N	Y	Y	Y	N	Y	Y	N	Y	N
III. Otherwise if other % or duration or basis	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
B. Appt Title is Post Grad Trainee/1-7, Intern (non-physician), Research Intern, Research Associate															
I. Salary Basis is C and sum of Appt Dept % \geq 33 and duration \geq 1 semester	N	N	Y	N	N	N	Y	Y	Y	N	Y	Y	Y	Y	Y
II. Salary Basis is A and sum of Appt Dept % \geq 33 and duration \geq 6 months	N	N	Y	N	N	N	Y	Y	Y	N	Y	Y	Y	Y	Y
III. Otherwise if other % or duration or basis	N	N	N	N	N	N	N	N	N	N	N	N	Y	N	Y
C. All other Title Codes															
I. Salary Basis is C and sum of Appt Dept % \geq 33 and duration \geq 1 semester	N	N	Y	N	N	N	Y	Y	Y	N	Y	Y	Y	Y	Y
II. Salary Basis is A and sum of Appt Dept % \geq 33 and duration \geq 6 months	N	N	Y	N	N	N	Y	Y	Y	N	Y	Y	Y	Y	Y
III. Otherwise if other % or duration or basis	N	N	N	N	N	N	N	N	N	N	N	N	Y	N	Y
6. Appointment Type = SH (Student Help)	N	N	N	N	N	N	N	N	N	N	N	N	Y	N	N
7. Appointment Type = CP (Classified Permanent)															
A. Appt Title is Represented	Y	Y	N	N	Y	Y	Y	Y	Y	N	Y	Y	Y	Y	Y
B. Appt Title is Non-Represented	Y	Y	N	N	Y	Y	Y	Y	Y	N	Y	Y	Y	Y	Y
8. Appointment Type= CJ (Classified Project)															
A. Duration \geq 12 months and Appt Dept % \geq 29% (600 hrs)	Y	Y	N	N	Y	Y	Y	Y	Y	N	Y	Y	Y	Y	Y
B. Otherwise if other % or duration	N	N	N	N	N	N	N	N	N	N	N	N	Y	N	Y

Appointment Eligibility Criteria	PLANS														
	WRS	SGH Reg	SGH Grad	ICI Unclass	ICI Class	SGL	Ind & Fam Life	UW Empl Inc	Den & Ex Med	UIA	AD &D	Dental Rep & Non-Rep	TSA WDC LTC	Vision	ERA
9. Appointment Type = CL (Classified LTE/Limited Term Employee)															
A. Duration \geq 12 months and Appt Dept % \geq 29% (600 hrs)	Y	Y	N	N	Y	Y	Y	Y	Y	N	Y	Y	Y	Y	N
B. Otherwise if appt. information is missing (e.g. appt%), or if Appt Dept % < 29 or duration < 12 months	N	N	N	N	N	N	N	N	N	N	N	N	Y	N	N
10. Rehired Annuitant															
A. Appointment type = AS or LI (Academic Staff or Limited) and Appt Title is not "Visiting"															
I. Salary Basis is C															
a. Sum of Appt Dept % \geq 28 and duration \geq 1 semester	N	N	N	N	N	N	N	N	N	N	N	N	Y	N	Y
b. Otherwise if other % or duration	N	N	N	N	N	N	N	N	N	N	N	N	Y	N	Y
II. Salary Basis is A or H															
a. Sum of Appt Dept % \geq 21 and duration \geq 6 months	N	N	N	N	N	N	N	N	N	N	N	N	Y	N	Y
b. Otherwise if other % or duration	N	N	N	N	N	N	N	N	N	N	N	N	Y	N	Y
III. Salary basis is L	N	N	N	N	N	N	N	N	N	N	N	N	Y	N	Y
B. Appointment Type is CL = (Classified LTE/Limited Term Employee)	N	N	N	N	N	N	N	N	N	N	N	N	Y	N	N
C. Appointment Type is not CL or AS	N	N	N	N	N	N	N	N	N	N	N	N	Y	N	Y