

HISTORY OF BENEFIT AND OTHER CHANGES
Revised 8/20/2009

Date	Benefit	Plan Feature	Change
11/1/2003	Accidental Death & Dismemberment	Domestic Partner	Coverage available to domestic partners.
1/1/2008	AD&D	Effective dates and new benefit added	Coverage or changes to coverage become effective the first of the month following receipt of application. A comprehensive travel assistance program is added as a benefit.
1/24/2004	Annual Leave	Personal Holiday	Additional personal holiday (8 hours to recognize Veterans Day) added for employees in Bargaining Units: 07(Fiscal & Staff Services) and 16,17,18,19, 96, 97, 98 and 99(Non-Represented).
1/1/2004	Annual Leave	Personal Holiday	Additional personal holiday (8 hours to recognize Veterans Day) added for employees in Bargaining Units: 11(Patient Care) and 15(Science).
1/1/1996	Annual Leave	Sick Leave	Supplemental Health Insurance Conversion Credits (SHICC) offered to all other employees (non WSEU) allowing an eligible employee to match their sick leave hours (must have at least 15 years continuous state service).
8/1991	Annual Leave	Sick leave and ASLCC	The Board of Regents amends UWS 19, which governs sick leave for faculty, academic staff, and limited appointees. The amendment changed the sick leave eligibility to parallel the WRS eligibility, in which anyone who did not meet the WRS eligibility requirement would not earn sick leave.
1/1/1989	Appointment	Creation of System	The UW appointment system was born in 1989. Therefore, any employee record which does not have an appointment start date was effective prior to 1/1/1989. Some departments/divisions entered the start dates for all appointments, but it was not mandatory.
7/1/1967	Bi-Weekly Classified Pay	Payroll	On July 1, 1976 the State of Wisconsin changed over from monthly payments for classified employees to bi-weekly.
1/1/2008	Dental	Enrollment period	The enrollment period is 30 days for any of the offered Anthem DentalBlue plans. Previously, the employee had 31 days to enroll.
9/28/2006	Dental	Supplemental Plan	New classified employees without 6 months of WRS will now be able to submit an application for DentalBlue Supplemental effective 1 st of the month after 6 months of WRS service. Similar to the SGH and EPIC programs.

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1/31/2006	Dental	Offered to Represented employees	The state-sponsored, 100% employee paid dental plan will now be offered to all remaining represented employees except for those employees represented by WSP. WSP was given an enrollment period in January 2006 along with the Non-Represented employees, for coverage effective February 1, 2006. Coverage will be effective May 1, 2006.
12/14/2005	Dental	New enrollment for non-represented employees and those represented by WSP.	The State of Wisconsin is now offering a state sponsored, 100% employee paid dental plan for all nonrepresented classified and unclassified employees, LTEs covered by the Wisconsin Retirement System but not collecting an annuity benefit, and employees represented by the Wisconsin Science Professionals (WSP). Coverage effective 2-1-2006.
4/1/2003	Dental	Domestic Partners	Coverage made available to domestic partners.
7/1/2008	Dental & Excess Medical	Months of service requirement	New classified permanent and project employees' second enrollment opportunity has been changed to month 3 rather than month 6. This change follows the SGH change for classified employees. This change does not apply to LTE's.
1/1/2008	Dental & Excess Medical	Vision	The Dental & Excess Medical (EPIC) plan adds vision benefits.
1/1/2005	Dental & Excess Medical	Graduate Coverage	An employee who was a Graduate Assistant, eligible for benefits, and did not enroll in this plan has the opportunity to enroll when they become eligible for WRS.
10/1/2003	ERA	Medical Expense Account	Over the counter medications are allowable expenses under the ERA.
1/1/2008	Graduate Assistant/Short term AS benefit eligibility	Grad to WRS enrollment	There is a new enrollment opportunity for employees who were eligible for graduate assistant benefits but elected not to participate in the program upon initial eligibility. They will have a second enrollment opportunity if they later become eligible for a Wisconsin Retirement System (WRS) eligible position and there is no break in service of 30 days or more. This was already allowed for the SGH program and now extends to Spectera, Anthem Dental

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			Blue, Individual & Family Life Insurance, and UW Employees, Inc. Life Insurance.
2/1/2007	ICI	Premiums	ICI premium rates will be based on the employee's average monthly earnings, as reported to the WRS, and their accumulated sick leave (selected elimination period for UW Unclassified staff). Calculation: employee's yearly WRS earnings rounded to the next higher thousand and divided by 12.
5/25/2006	ICI	New employer error provision established	Wisconsin Act 402, effective May 25, 2006, allows an employee to obtain ICI coverage when, as a result of employer error, an eligible employee has not filed an ICI application. Employer error will be considered on a case by case basis.
2/21/2005	ICI	Supplemental Coverage	Open enrollment for ICI supplemental 2-21-05 to 3-11-05. Coverage effective 4-1-05.
8/1/1996	ICI	Premium Holiday Ended	There was a premium holiday from 1988 to 8/1/1996 during which employees did not pay premiums.
1/1/2005	Ind & Family	UW Hospital Plan	Individual & Family coverage became a separate plan at UW Hospital.
6/1/2004	Individual & Family Group Life	Domestic Partners	Coverage available to domestic partners.
5/1/2003	Individual & Family Group Life	New Vendor	Program was taken over by Minnesota Life from previous vendor National Guardian Life as NGL was getting out of the life insurance business
1/1/2003	Leave	Military	Wis. Act 162 implemented increasing military leave time without loss of pay or benefits to 179 days which was expanded to 2 years by Executive Order.
11/1995	Leave	Supplemental Sick Leave Credits	Supplemental Health Insurance Conversion Credits bargained as part of the WSEU contract allowing an eligible employee to match their sick leave hours (must have at least 15 years continuous state service).
1/1/1972	Leave	Sick Leave Credits	ASLCC allows an eligible employee to convert their sick leave to pay for health insurance.
10/2004	Long Term Care	Long Term Care	Long Term Care insurance is available to State and University employees.
7/1/2004	Person Folders	Individual Records	Benefit plan files no longer exist. Person folders were created for all employees. The folders include all benefit plan applications and all other miscellaneous documents for that person. The name and last 4 digits of the SSN are used for filing purposes.

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1/1/2007	Spectera	New Benefit plan	Spectera, a vision plan, will now be offered to UW employees and their domestic partners. Open enrollment will be October 9 through November 17, 2006. Coverage will be effective January 1, 2007.
1/1/2010	State Group Health	Domestic Partners	Coverage for Domestic Partners effective 1-1-2010.
1/1/2010	State Group Health	Dependents	Coverage for Dependents covers unmarried children to age 27, effective 1-1-2010.
7/31/2008	State Group Health	Early Coverage Codes	Early Coverage codes were discontinued for use in processing State Group Health Insurance effective with entries after 7-31-2008.
7/1/2008	State Group Health	Employer Contribution for Classified	For new classified permanent and project employees', the months of service required for employer contribution towards health insurance premiums will be reduced from 6 months to 3 months. This change does not apply to LTE's.
5/2006	State Group Health	Rehired Annuitants	Per UW System policy, Rehired Annuitants are no longer eligible for graduate assistant insurance.
1/1/2004	State Group Health	Various Changes	Standard Plan II is eliminated. Birth of Navitus the Pharmacy Benefit Manager 3 tier premium system (for those with settled contracts)
1/6/1998	State Group Health	Employer Contribution for Unclassified	UW Unclassified employees received first day pick-up of Employer contribution to health insurance paid by UW funds.
4/5/2008	State Group Life	Evidence of Insurability	Prior to April 5, 2008 active employees could only apply through evidence of insurability prior to reaching age 55. As of April 5, employees may now apply through evidence until age 70.
8/1/2000	State Group Life	Life Value for Long Term Care	Option to use State Group Life to pay for Long Term Care became effective.
5/1/1998	State Group Life	New Coverage's	Three additional levels of State Group Life Insurance offered
1/1/1995	State Group Life	Life Value for Sick Leave Credits	Option to convert life insurance present value to pay health insurance premiums.

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4/1990	State Group Life	50% Supplemental Coverage Ended	Prior to April 24, 1990, a 50% Supplemental Plan was available. Employees covered under the 50% plan before 4-24-90 retain this coverage until they no longer participate in this group plan, they elect to cancel, or coverage terminates due to age or retirement.
1/1/1984	State Group Life	Negative Enrollment End	Change from "negative" enrollment to "positive" enrollment.
12/31/2008	TSA	WRS 403(b) Contributions	WRS 403(b) contributions will be discontinued at the end of 2008.
1/1/2003	TSA	Maximum Contribution Change	Provisions of the EGTRRA Legislation were made permanent.
1/1/2002	TSA	Maximum Contribution Change	EGTRRA: Federal rules enhanced the retirement savings plan by eliminating the percent cap, raised the max contribution levels and allowed maximum contribution to both TSA and WDC.
1/1/1997	TSA	Database	TSA database was created.
3/1995	TSA	UW Admin Fee began	The annual TSA fee was implemented. It started as \$6.50.
1/1/2006	UIA	Rehired Annuitants	If an employee returns as a Rehired Annuitant, they will no longer have the UIA premium taken by payroll deduction. They will be responsible for submitting a payment directly to the vendor each year.
8/25/2006	Union Dental	Withdrawal of DentalBlue	The contract for DentalBlue was not renewed because the State of Wisconsin now has a contract for dental insurance with DentalBlue for represented employees. There were very few differences between the state's plan and the union's plan.
9/20/2003	University Insurance Association	New Vendor	Program was taken over by Minnesota Life from previous vendor National Guardian Life as NGL was getting out of the life insurance business
12/1996	UW Madison and UW Hospital Split	Separation of Entities	The University and UW Hospital made their separation from each other. UW Hospital EE's were broken into 2 groups: Board and Authority.
7/1/2001	Veterans Diagnostic Lab	New UW Madison Division	The Veterans Diagnostic Lab (VDL) became a UW Madison Division, formerly part of the Department of Agriculture, Trade and Consumer Protection (DATCP).

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7/1/2008	WRS	Accelerated Payments	If the employee dies before reaching age 62, the temporary annuity will be paid to the named survivor or beneficiary(ies) through the month in which the employee would have reached age 62 regardless of the option they chose, even if there are no death benefits payable from the lifetime portion of the annuity option they selected.
4/5/2008	WRS	Standard Sequence of Beneficiaries	The new standard sequence is as follows: <ol style="list-style-type: none"> 1. Surviving spouse 2. Children* 3. Grandchildren 4. Parents 5. Siblings** 6. Estate <p>*If one of your children dies before you, that child's share is divided between the deceased child's children. ** If one of your siblings dies before you, that sibling's share is divided between the deceased sibling's children.</p>
4/6/2006	WRS	Fixed Retirement Fund	The name of the Fixed Retirement Fund was changed from "Fixed" to "Core" in order to more accurately reflect the type of investments into which these monies are being invested.
1/1/2001	WRS	Variable program re-opened	Variable program reopened to new employees.
1/1/2000	WRS	Benefit Changes	Wisconsin Act 11 becomes effective. This benefit improvement bill included changes to the formula factor for computing retirement benefits, changed the interest allocation on benefits, etc.
1/01/2000	WRS	Death Benefits	The WRS death benefit payable if an employee dies while in active service is the same regardless of the beneficiary's relationship to the employee or the age of the employee at death. The death benefit includes both employee and employer contributions.
7/5/1998	WRS	Seniority Date	If an employee left service prior to July 5, 1998 and is reemployed within 3 years, the continuous employment status shall not be interrupted. (Admin

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			code ER 18.02) If an employee left service after July 5, 1998 and is reemployed within 5 years, employment prior to leaving and upon returning to the service within 5 years must be as a permanent, classified employee or as an unclassified employee other than a limited term employee. (Admin code ER 18.02) The seniority date will be adjusted, if applicable, as it is dependent on what position the employee was in when they left employment and what position they returned to.
7/1/1998	WRS	Good Faith Termination	Valid Termination rule created Wis. Admin. Code ETF § 10.08 defines the conditions that constitute a valid termination and applies to terminations of WRS participating employment that occur on or after July 1, 1998.
4/24/1998	WRS	Eligibility change	Vesting requirement eliminated.
12/23/1997	WRS	Death Benefit	Age for the "special" death benefit calculation for an active employee is lowered to 55 (age 50 for protective).
10/16/1992	WRS	Long Term Disability Insurance began	Employees who began or resumed WRS covered employments are eligible for LTDI, and are not eligible for WRS disability benefits.
4/23/1992	WRS	Rehired Annuitants	Rehired annuitants in a qualifying position can elect or decline WRS coverage.
1/1/1990	WRS	Eligibility change	Vesting requirement began.
1/1/1990	WRS	Interest Change	The annual interest rate on the balances for payment of a separation was lowered to 3% for employees who were first covered by WRS on or after 1/1/82.
5/16/1989	WRS	Interest change	Separation benefits no longer included monthly interest.
1/1/1985	WRS	Interest on WRS account capped	Annual interest rate capped at 5% for employees who were first covered by WRS on or after 1/1/82.

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1/1/1982	WRS	Merger of the three retirement systems	The Wisconsin Retirement System (WRS) statutes were merged into Chapter 40 from previous statutes that governed the Wisconsin Retirement Fund, the State Teachers Retirement System, and the Milwaukee Teachers Retirement Fund.
4/30/1980	WRS	Variable program closed	Variable annuity program closed for new employees. Employees in the variable annuity program could cancel variable participation.
1/1/1973	WRS	Qualifying period ended	6 month qualifying time for WRS participation discontinued
12/31/1963	WRS	Taxation of teacher retirement	WRS payments from the account of a "teacher" category employee who had a State Teachers Retirement System account balance as of December 31, 1963 are exempt from Wisconsin income tax. The exemption does not apply to payments from a WRS tax-deferred (403-b) account. There will be a partial exemption if the WRS benefit is based on both "teacher" category service and non-teacher category service.
2/25/2005	WSEU	Withdrawal of a unit of employees	Members of Law Enforcement unit withdraw from WSEU.