

Employer Instructions for the Enrollment Deadline Worksheets

Important Information for Users with Older Versions of Excel

If you have an older version of Excel, you may receive an error message, **#Name?**, in the "Date on which 6 months WRS coverage is completed" field. If you receive this error message, you must enable the "Analysis ToolPak" in Excel. To enable this feature, open a spreadsheet in Excel, click on "Tools" in the toolbar, click "Add-Ins" and then check the box next to "Analysis ToolPak." This will install the correct ToolPak and all features of the spreadsheets will work correctly.

Select Appropriate Enrollment Deadline Worksheet - there are six different enrollment deadline worksheets:

1. *Classified Permanent & Project Employee Enrollment Deadlines Worksheet (UWS-200)* – use for all WRS-covered classified permanent and project employees.
2. *Unclassified Employee Enrollment Deadlines Worksheet (UWS-203)* - use for all WRS-covered unclassified faculty, academic staff and limited employees.
3. *Classified LTE Enrollment Deadline Worksheet (UWS-201)* – use for WRS-covered LTEs.
4. *Graduate Assistant & Short-Term Unclassified Deadline Worksheet (UWS-205)* – use for non-WRS-covered Student Assistants, Employees-in-Training and Short-Term academics.
5. *Classified Permanent & Project Employee Enrollment Deadlines Worksheet – **Transfers Only** (UWS-202)* – use for classified permanent and project transfers with at least 6 months of service.
6. *Unclassified Employee Enrollment Deadlines Worksheet – **Transfers Only** (UWS-204)* – use for WRS-covered unclassified transfers with at least 6 months of service.

Effective for Classified Hires December 2, 2011 or Later: The Represented Classified Employee Enrollment Deadlines Worksheet (UWS-200a) and Represented Classified Employee Enrollment Deadlines Worksheet – **Transfers Only** (UWS-202a) are no longer available. Classified union-represented employees (new hires or transfers) are no longer eligible to enroll in Anthem Dental Insurance in 2012 so these employees no longer need a separate worksheet.

All worksheets are protected and you can use the "Tab" key to move between unprotected fields. All protected fields will automatically calculate amounts/deadlines based on information you enter. Please do not unprotect the sheet when you work with it because there are embedded formulas that may be altered if you enter information in fields that contain formulas. "Unprotect" at your own risk.

When you first open the spreadsheet, the enrollment deadlines will list the year "1900." This is just a default value and it will update when you enter a WRS begin date (or hire date for grads).

Enter the following information on all worksheets used for WRS-covered employees (these fields are unprotected):

- Date
- File Copy (enter last 4 digits of SSN)
- Employee Name
- Campus Name or UDDS
- Job Type – there is a drop-down menu in this cell. Select the appropriate job type.
- Job Title
- Person ID
- Appointment %: Enter a whole number (e.g. 50). The percentage you enter in this box will drive the statement under SGH that indicates whether or not an employee is eligible for the full employer contribution towards health insurance.

- State Service: Enter the number of months of prior WRS-covered state service, up to 12 months. If an employee has more than 12 months of prior WRS-state service, enter 12 and then tab to the next cell, which has a drop down menu, and select “plus months.”
- Local Service: Enter the number of months of prior WRS-covered local service, up to 12 months. If an employee has more than 12 months of prior WRS local service, enter 12 and then tab to the next cell, which is has a drop down menu, and select “plus months.”
- First day of WRS-covered employment at UW: enter the first day of UW System WRS-covered employment.

Employees with Prior WRS Service

- If an employee has prior WRS service, the worksheets will automatically calculate the enrollment deadlines and account for the prior WRS service.
- If an employee has less than 6 months of prior WRS service, the worksheets should calculate the deadlines correctly but you should review the calculations to ensure accuracy.

Automated Fields – many fields automatically pre-fill based on the information entered in the employee information section on the first page. Some of these fields will have to be manually adjusted on the transfer and LTE worksheets (see below for more information).

- Health Insurance – appointment percentage entered will determine whether or the not employee is eligible for the full employer contribution towards health insurance. The appropriate message will auto-fill in the health insurance section.
- State Group Life Insurance – the value of each unit of coverage will auto-fill based on the employee’s annual salary.
- ICI – the employee’s monthly salary for ICI premium purposes will auto-fill based on employee’s annual salary, rounded to the next \$1000 and divided by 12.
- ICI – a message will appear in the ICI section indicated whether or not an employee is eligible for Supplemental ICI. It auto-fills based on the employee’s annual salary.

Limitations of Worksheets

- The worksheets do NOT determine benefit enrollment eligibility based on appointment percentage or job type. All of the enrollment deadlines are based on what you enter for prior service and WRS begin date (or hire date for grads).

Additional Instructions for Specific Worksheets

Classified Employee Enrollment Deadlines Worksheet (includes transfer worksheet)

- Hourly Rate: enter the employee’s base hourly rate.
- Biweekly salary: automatically derived by multiplying the hourly rate by 80 hours and then multiplying by the appointment percentage.
- Annual salary: automatically derived by multiplying the hourly rate by 2080 hours and then by the appointment percentage. **Note:** The annual salary drives the SGL and ICI coverage levels. Per ETF, SGL and ICI coverage levels are based on hourly rate x 2080 hours (prorated if part-time; rounded to next \$1000)

Unclassified Employee Enrollment Deadlines Worksheet (includes transfer worksheet)

- Appointment Type: Select 12 month (A-Basis) or 9 month (C-Basis) based on regular appointment. Do not include summer salary for C-basis employees.
- Annual Base Salary: enter the annual base salary based on a full time appointment. Do not include summer salary for C-basis employees.
- Annual salary (based on appt %): automatically derived by multiplying annual base salary by the appointment percentage.

- Monthly salary: automatically derived by dividing the annual base salary based on appt % by either 9 or 12 months, depending on selected appointment type.

Unclassified and Classified Transfer Worksheets

- These worksheets only work if the employee has at least 6 months of prior WRS service. If the employee has less than 6 months of prior WRS service, use the regular worksheets if possible.
- State Group Life: enter the per unit value of the employee's current SGL coverage (the value of Basic coverage only). If the employee is not covered, enter "NA" or if you don't have the transfer record, enter "unknown."

Classified LTE Enrollment Deadlines Worksheet (this worksheet has additional manual adjustments that are necessary)

- Many LTE positions do not have an appointment percentage attached to them. If you are completing this sheet and the LTEs hours vary, you should enter "0" in the appointment percentage field. You should enter the employee's hourly rate but the biweekly rate and annual salary will say "Varies."
- If the LTE has a specific appointment percentage, you should enter the appointment percentage and the biweekly rate and annual salary will calculate accordingly.
- In the body of the worksheet under State Group Health Insurance, there is a drop down menu that you will have to **manually select** to indicate whether or not the employee is eligible for the full employer contribution towards health insurance. This feature is automatic on the other worksheets but it is a manual selection on the LTE worksheet only.
- State Group Life: enter the estimated per unit value of coverage.
- ICI: enter the estimated monthly salary that will be used to determine ICI premiums.
- ICI: Select from the drop down list whether the employee will be eligible for Standard ICI only or if also eligible for Supplemental ICI.
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Graduate Assistant & Short-Term Unclassified Employee Enrollment Deadline Worksheet

- Hire Date: enter the begin date of the benefits-eligible position.
- See instructions under the Unclassified Employee Enrollment Deadlines Worksheet above for information regarding appointment and pay information.
- All enrollment deadlines will fill, regardless of job title entered. There is a disclaimer at the bottom of the form that indicates some job titles may not be eligible for all benefits.

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