

BENEFITS ADMINISTRATION TRAINING

PART FIVE: WISCONSIN RETIREMENT SYSTEM (WRS) ELIGIBILITY, LOOKBACK,
REPORTING AND REHIRED ANNUITANTS

WRS ELIGIBILITY

Definition

Eligibility requirements

WRS DEFINITION

- The Wisconsin Retirement System is a qualified retirement system under Section 401(a) of the Internal Revenue Code.
- The WRS is a pension plan with both defined benefit and defined contribution components.
- Employee and employer contributions may fluctuate annually
- An employee must be a member of the WRS in order to be eligible for insurance benefits such as health, State Group Life and Income Continuation Insurance.

WRS ELIGIBILITY

REFERENCE: [WRS ADMINISTRATION MANUAL](#); CHAPTER 3

- Employers are responsible for evaluating and determining each employee's eligibility for WRS participation.
- Employees who meet the eligibility criteria **must** be enrolled in the WRS. The employee does not have a choice unless the employee is a WRS annuitant upon hire.
- Employees who do not meet the eligibility criteria **may not** be enrolled in the WRS.
- Agencies must do a WRS Prior Service Check to verify if an employee has prior WRS **State** service

WRS ELIGIBILITY

- Several opportunities exist in statute for an employee to be eligible for participation in the WRS. The various opportunities for the eligibility criteria to be met are:
 - When first hired
 - When expectations change
 - On the one-year anniversary date of employment
 - During a 12-month rolling look-back if not WRS eligible within the first year

NOTE: The WRS eligibility criteria must be met independently at each state agency

WRS ELIGIBILITY

- The agency should review all jobs to confirm if a second Benefit Record is needed.
 - Ex: Is the employee already WRS eligible at a different agency?
 - Ex: Employee is currently not eligible at an agency but is WRS eligible as a new hire at a different agency
- Multiple Benefit Records are needed if:
 - The employee is in 2 different WRS categories
 - The employee is employed at more than one agency
 - If an employee has a National Guard job row, a second Ben Record is almost always required

** You can refer to [Multiple Jobs and Benefit Records Ben Admin Training](#) for additional details and examples.

WRS LOOKBACK

Reports

Updating Job Data

ELG event

WRS LOOKBACK

- Agencies must run the WRS Lookback Report after every payroll confirm to identify employees' who may be eligible for WRS coverage
- **Navigation:** Workforce Administrator Homepage— Benefits Administration Dashboard – Benefit Enrollments Tile – Reports & Queries Folder – WRS Tracking Report
- Enter the Pay Period End Date = the last day of the last confirmed pay period
- Enter Business Unit
- Click Run

The screenshot shows a web interface for running a WRS Tracking Report. At the top, there is a tab labeled "Run WRS Tracking Rpt". Below the tab, the "Run Control ID" is set to "jap". To the right of the control ID are links for "Report Manager" and "Process Monitor", and a yellow "Run" button. The main section is titled "WRS Lookback Report Parameters" and contains several input fields: "*Pay Period End Date" with the value "06/04/2022", "Business Unit" with the value "43500", "Department", "Location Code", and "Empl ID". Each field has a magnifying glass icon for search. A red box highlights the "*Pay Period End Date" and "Business Unit" fields. At the bottom of the form, there are buttons for "Save", "Notify", "Add", and "Update/Display".

WRS LOOKBACK

- The report will sometimes overstate hours
 - Run WI_WRS_LOOKBACK_DAY Query to review hours by day to confirm eligibility
 - Review the WRS Lookback Job Aid for details about how to run the report:

<https://dpm.wi.gov/Documents/JobAids/HCM/BN/WRSLookback.pdf>

ID	Empl Record	Date Worked	TRC	WRS Elig Hours	WRS Elig Earnings	Status	Frozen Date	Earn Code	Earn Code
100074151	0	9/26/2016	REGLR	8.500000	265.630000	Distributed	10/1/2016	REG	
100074151	0	9/27/2016	REGLR	7.500000	234.380000	Distributed	10/1/2016	REG	
100074151	0	9/28/2016	REGLR	8.750000	273.440000	Distributed	10/1/2016	REG	
100074151	0	9/29/2016	REGLR	8.000000	250.000000	Distributed	10/1/2016	REG	
100074151	0	9/30/2016	REGLR	7.250000	226.550000	Distributed	10/1/2016	REG	
100074151	0	10/3/2016	REGLR	8.250000	257.810000	Distributed	10/15/2016	REG	
100074151	0	10/4/2016	REGLR	8.500000	265.630000	Distributed	10/15/2016	REG	
100074151	0	10/5/2016	REGLR	8.250000	257.810000	Distributed	10/15/2016	REG	
100074151	0	10/6/2016	REGLR	9.500000	296.880000	Distributed	10/15/2016	REG	
100074151	0	10/7/2016	REGLR	5.500000	171.870000	Distributed	10/15/2016	REG	
100074151	0	10/10/2016	REGLR	12.000000	375.000000	Distributed	10/15/2016	REG	
100074151	0	10/12/2016	REGLR	11.000000	343.750000	Distributed	10/15/2016	REG	

UPDATING JOB TO REFLECT WRS ELIGIBILITY

- When an employee becomes WRS eligible, you must update Elig Fld 1 and 2 (and 3 if an LTE) in Job Data to reflect the correct WRS category
- Add a job row with an effective date of the 1st day of WRS coverage
 - Action: Data Change
 - Reason: Benefits Eligibility Config

Work Location Details ?

1 of 14

*Effective Date 05/22/2022

Effective Sequence 0

HR Status Active

Payroll Status Active

Go To Row

*Action Data Change

Reason Benefits Eligibility Config

*Job Indicator Primary Job

UPDATING JOB TO REFLECT WRS ELIGIBILITY

- Click on the Employment Data link at the bottom of the page and change the benefits service date to the WRS begin date

Organizational Assignment Data

Instance Record

Last Assignment Start Date	08/20/2017	First Assignment Start	08/20/2017
Assignment End Date			
Home/Host Classification	Home		
Company Seniority Date	02/04/2002	<input checked="" type="checkbox"/> Override	Years Months Days 20 4 9
Benefits Service Date	5/22/2022	<input checked="" type="checkbox"/> Override	20 4 9
Seniority Pay Calc Date	08/20/2017	<input type="checkbox"/> Override	4 9 24

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

Employee [redacted] Empl ID [redacted]
Empl Record 0

Work Location Details

*Effective Date 05/22/2022
Effective Sequence 0 *Action Data Change
HR Status Active Reason Benefits Eligibility Config
Payroll Status Active *Job Indicator Primary Job

Position Number 040371 PAYROLL BEN SYSTEMS COOR-SEN
Override Position Data

Position Entry Date 08/20/2017 Position Management Record Override Position Entry Date

Regulatory Region USA United States
Company WIS State of Wisconsin
Business Unit 50500 Administration
Department 505P1A0000 Bur Human Resources Info Sys
Department Entry Date 06/24/2018
Location MADEW10017 505 ADMINISTRATION BLDG

Last Start Date 08/20/2017
Expected Job End Date

Job Data | **Employment Data** | Earnings Distribution | Benefits Pro

UPDATING JOB TO REFLECT WRS ELIGIBILITY

- Enter the applicable values on the Benefits Program Participation Page
 - Elig Fld 1 = WRS Category
 - Elig Fld 2 = ICI Eligibility
 - Elig Fld 3 = required if LTE – identify eligibility for employer contribution towards health

Benefits Administration Eligibility ?

BAS Group ID	<input type="text"/>	<input type="text"/>	<input type="text"/>
Elig Fld 1	30_GENERAL	Elig Fld 2	ICIBASSUP6
Elig Fld 4	<input type="text"/>	Elig Fld 5	<input type="text"/>
Elig Fld 7	<input type="text"/>	Elig Fld 8	<input type="text"/>
		Elig Fld 9	<input type="text"/>

Elig Fld 3: LESSTHAN50

UPDATING JOB TO REFLECT WRS ELIGIBILITY

This will create an ELG event and a WRS event will also be created overnight to enroll the person in WRS

This employee will have to complete paper applications

eBN will NOT open to this employee (ELG event)

Use the ELG event to enroll the employee in benefits

It is configured the same way as the HIR event relative to effective dates

NEWLY WRS ELIGIBLE – LTE'S

- If LTE has at least 6 months of prior WRS State service, can use the ELG event to make all benefit elections including health
- If LTE does NOT have 6 months of prior WRS State service, do NOT make a health election on ELG event in Plan Type IV – it will set the coverage effective date to the 1st of the month on/following 2 months of WRS service
- If the LTE enrolls in health at 6 months, add a manual SHR event to the BAS Activity Table with an event date = date LTE has 6 months of WRS service. The SHR event should be added closer to the 6-month mark.
 - EE WRS effective date is 3/15/xx; SHR event date = 9/15/xx; coverage is effective 10/1/xx. SHR event should be added in September.
 - Enter health election on SHR event – coverage effective on 1st of month on/following completion of 6 months of WRS service

COLLECTING WRS CONTRIBUTIONS

- Please refer to the [WRS Lookback Job Aid](#) for specific details on the following situations:
 - Collecting missed contributions for previous year or current year
 - Overriding/refunding contributions due to WRS effective date and hours submitted on timesheet (Ex: Mid pay period WRS begin date)
 - Multiple salary rates during the period in which the employee should have been covered by the WRS

WRS REMITTANCE REPORTING



WRS REMITTANCE REPORTING

- Each agency is responsible for reporting WRS earnings and expected contributions to ETF on a monthly basis
- Report total WRS earnings by category by the 24th of each month
 - Ex. July WRS reportable earnings must be reported by August 24th
- WRS reportable earnings for the month are based on “when paid” (check date) not “when earned”
- Date parameters correspond to the payroll begin date and payroll end date for checks paid in that reporting month

2022 WRS Dates
 July: 6/19/22 – 7/16/22
 August: 7/17/22 – 8/13/22
 Sept: 8/14/22 – 9/10/22

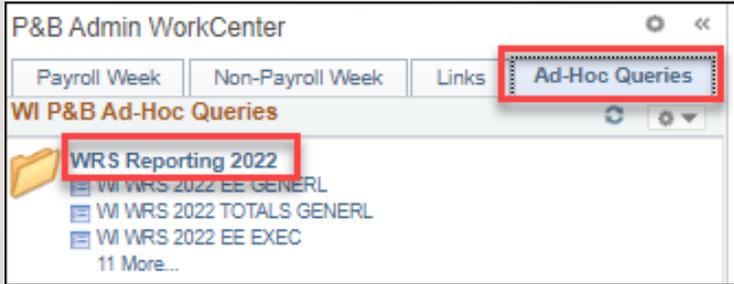


PAY PERIOD NUMBER	EARNINGS PERIOD	CHECK DATE
14A	06/19/22-07/02/22	07/14/22
15B	07/03/22-07/16/22	07/28/22
16A	07/17/22-07/30/22	08/11/22
17B	07/31/22-08/13/22	08/25/22
18A	08/14/22-08/27/22	09/08/22
19B*	08/28/22-09/10/22	09/22/22

NOTE: Region 2 WRS Remittance Reporting is done by DOC Central Office only.

WRS REMITTANCE REPORTING

- WRS queries to use for the total hours/earnings/contributions by category
 - WI_WRS_2022_TOTALS_GENERL
 - WI_WRS_2022_TOTALS_EXEC
 - WI_WRS_2022_TOTALS_PROT
 - WI_WRS_2022_TOTALS_PROTXO
 - WI_WRS_2022_TOTALS_PROTXX
 - WI_WRS_2022_TOTALS_DOTGR
- All queries are available on the Ad-Hoc Queries tab in the P&B Admin WorkCenter



WRS REMITTANCE REPORTING

- The “Sum WRS Earnings” and “Sum WRS ADD 00 A” totals will be reported to ETF.

Co	Group	Unit	Elig Fld 1	Sum WRS Hours	Sum WRS Earnings	Sum WRS Ded 7W B	Sum WRS Ded 7W N	Sum WRS Ded 7W A	Sum WRS Ded 7Y N	Sum WRS Add 00 A
WIS	435	43500	30_GENERAL	725940.63	24532954.68	1594735.17	1594678.79	0.00	196267.57	10471.90
WIS	435	43500	40_TEACHER	5757.17	174182.62	11321.86	11321.86	0.00	1393.45	0.00

- Multiply the earnings by the appropriate WRS category % (Total WRS + Sick Leave Contributions) to obtain the ETF expected contributions
- Sum all additional contributions for all categories
- See the [WRS Reporting Job Aid](#) and [2022 Reporting Template](#) for details



WRS REMITTANCE REPORTING

- Remittance entry completed using the WRS Contribution Remittance Entry application of the ETF One site:

<https://etfonline.wi.gov/etf/internet/employer/one.html>

- “Regular” is used to report the month that is currently due
- “Supplemental” is used to correct a month previously reported

**Wisconsin Employee Trust Funds (ETF)
Monthly Retirement Remittance Report Access**

Authorized Personnel Only

Version 1.0

Employee Trust Funds (ETF) Wisconsin Retirement System Automated Monthly Remittance Reporting System is a way to Report Earnings, Contributions and other amounts without using paper or wire transfers. You must first have both an ACH account and and logon ID set up with ETF.

To connect to the Automated Monthly Remittance Reporting System, please enter your Employer Number and select the type of report you intend to submit: 'Regular' or 'Supplemental'.

Employer Number:

WRS REMITTANCE REPORTING

- Confirm employer name and address information
- Enter the employee earnings and total contributions by category
- The total additional is reported on Line 2
- “Submit”, review entries, “Confirm” and “Print”

**Wisconsin Employee Trust Funds (ETF)
Employer Remittances**

Refer to the WRS Administration Manual Chapter 7 for detailed instructions in completing this form.
[Click here to view the manual.](#)

Please enter the information requested and press the 'Submit' button.

Informational Section

The following information provides your current balances. Please make payment or take credit as indicated.	
Over Or Under Amount (Enter on Line 1)	-2,440.00
No open invoices found for this employer.	
Please contact (608)266-3309 if you have questions.	

Entry Section

Employer Name and Address	Employer Identification Number	Remittance type Regular
Agent Name:	Report Type:	Regular
Agent Title:	Normal Due Date:	04/24/2018
Employer Name:	Reporting Month and Year (change for Supplemental ONLY):	03/2018
Agent Address 1:	Date Entered:	04/23/2018
Agent Address 2:	Requested Transfer Date (mmddccyy):	
Agent City:		
Agent State/Zip:		

Employment Category Title (Code):	Employee Earnings	Total Rate	Total Contributions
General, Educational Support Personnel (00, 01, 12, 30, 31, 42)		14.800	
Elected Officials and Executive Employees (02, 05, 06, 07, 08, 09, 11, 32, 35, 36, 37, 38, 39, 41)		14.800	
Protective with Social Security (03, 33)		18.630	
Protective without Social Security (04, 34)		0.000	
Teachers (10, 40)		0.000	
Total Earnings		Sub-total of Contribution Lines	

1. Over or Underpayment and/or Interest Due for Late Reported	
2. Additional Contributions	
3. Total Invoice Items (from "Invoice Detail Section" below)	
4. Other Payments	
5. GRAND TOTAL OF ALL LINES ABOVE (System will calculate the grand total)	

REHIRED ANNUITANTS

Definition

Submitting a ticket

Hire row and how to make changes

DEFINITION OF A REHIRED ANNUITANT

- An annuitant is a person who is receiving a monthly retirement benefit (annuity) from the Wisconsin Retirement System (WRS).
- A rehired annuitant is someone who has met all terms and conditions associated with having a valid termination and has met the minimum break in service requirement to return to work for a WRS employer
- All rehired annuitants must complete the ET-2319 form upon meeting WRS eligibility requirement – see page 5 of the ET-4105 brochure.
 - Information for Rehired Annuitants brochure: [ET-4105](#)
 - Rehired Annuitant Form: [ET-2319](#)

HIRE ROW AND JOB DATA CHANGES

- An agency must complete a prior WRS service check for all new hires, including Rehired Annuitants
- Example:

Name:
Birthdate:

Retirement Annuity Information
Annuity: [ET-2319 Rehired Annuitant Form](#) This member is receiving an an
Minimum Break in Service Ends: 12/01/2016
Annuity Benefit Effective Date: 07/01/2021

Lump Sum (Separation or Retirement) Benefit Information
Taken Lump Sum Benefit:

Previous Service (Dates prior to 1985 do not display)

State	Category	Enrollment Date/ Begin Date Change	Termination Date
0001-176	03	11/01/2004	11/13/2004
0001-176	03	11/14/2004	07/03/2011
0001-176	33	07/03/2011	07/11/2015
0001-176	33	07/12/2015	09/16/2016

Message: No state service or local service.

HIRE ROW AND JOB DATA CHANGES

- When an agency hires a Rehired Annuitant, Elig field 1 should reflect a Rehired Annuitant code:

NOTELIG_92	Reh Ann retired pre 7/2/13
NOTELIG_93	RehAnn post7/1/13WRSpre7/1/11
NOTELIG_94	RehAnn post 7/1/13 noWRS7/1/11

Benefits Administration Eligibility ?

BAS Group ID

Elig Fld 1

Elig Fld 2

Elig Fld 3

Elig Fld 4

Elig Fld 5

Elig Fld 6

Elig Fld 7

Elig Fld 8

Elig Fld 9

- They should not be put under the WRS as of the date of hire. The enrollment will suspend on the WRS file.

HIRE ROW AND JOB DATA CHANGES

- If the Rehired Annuitant has met the WRS eligibility requirements, the agency should have the employee complete the following:
 1. ET-2319 form
 2. Benefit applications for all applicable plans
- The agency will send the ET-2319 along with the health, SGL and ICI applications to ETF for review
- Once you receive a letter from ETF confirming their WRS annuity has been stopped and the effective dates of coverage for health, SGL and ICI, the following action should be taken:

HIRE ROW AND JOB DATA CHANGES

- Submit a ticket, attaching the confirmation letter from ETF
 - Subject line should state “employee name, empl ID and Rehired Annuitant”
- Add a row to job data
 - The effective date is equal to date on the ETF approval letter – usually the 1st of the month
 - Action/Reason = data change/benefits eligibility config
 - Update Elig field 1 with the correct WRS category
 - Update Elig field 2 with the appropriate ICI category
- Review and update ABBR
- An ELG event will be created, and you can enroll the employee in benefits on this event
 - Please note that SGL coverage may have a different effective date, so an ADM event may be required
 - Ex: Employee is WRS eligible on 6/1/xx, health and ICI will be effective 6/1/xx, but SGL may not be effective until 8/1/xx
 - Central Benefits will confirm event is closed, adjust deduction begin dates and trigger retro where needed.

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

Employee Empl ID
Empl Record 0

Work Location Details ?

*Effective Date 08/01/2022

Effective Sequence 0

HR Status Active

Payroll Status Active

*Action Data Change

Reason Benefits Eligibility Config

*Job Indicator Primary Job

Go To Row + -

Benefits Administration Eligibility ?

BAS Group ID

Elig Fld 1 30_GENERAL

Elig Fld 2 ICICATGRY1

Elig Fld 3

Elig Fld 4

Elig Fld 5

Elig Fld 6

Elig Fld 7

Elig Fld 8

Elig Fld 9

RESOURCES

WRS Eligibility

Rehired Annuitants

RESOURCES

- WRS Administration Manual: <https://etf.wi.gov/resource/wisconsin-retirement-system-administration-manual>
- WRS Lookback Job Aid: <https://dpm.wi.gov/Documents/JobAids/HCM/BN/WRSLookback.pdf>
- WRS Reporting Job Aid: https://dpm.wi.gov/Documents/Central_Benefits/WRSReportingJobAid.pdf
- 2022 WRS Reporting Template: https://dpm.wi.gov/Documents/Central_Benefits/2022_WRS_Reporting_Template.xlsx
- Information for Rehired Annuitants Brochure: <https://etf.wi.gov/resource/information-rehired-annuitants>
- Rehired Annuitant Election form: <https://etf.wi.gov/resource/rehired-annuitant>



QUESTIONS?