



State of Wisconsin Department of Administration

Wisconsin Retirement System (WRS) Lookback Report

Version 1.4

Version History

Version	Date	Editor	Description
1.4	5-28-19	Danielle Tesch	Updating Screenshots for Fluid Implementation; Removed embedded documents and made them links
1.3	4-9-18	Danielle Tesch	Updating Processes and Clarifications
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NOTES ON USING THIS GUIDE

- The scope of the guide covers Wisconsin Retirement System (WRS) Lookback polices, the WRS Lookback report and the business process associated with placing an employee under the WRS in STAR.

WRS LOOKBACK RULES

Initial WRS Eligibility (not a Rehired Annuitant)

WRS Eligibility Rules are fully outlined in [Chapter 3](#) of the WRS Administration Manual.

If an employee is not initially eligible for the Wisconsin Retirement System (WRS) at hire, the employee may later become eligible for coverage either through an expectation change or when the employee has worked at least one calendar year and a requisite number of hours. Once an employee has worked for one year, the employer is required to evaluate WRS eligibility. The purpose of the WRS Lookback report is to identify the potentially-eligible employees for evaluation.

Once the employee has worked one year, the employee is eligible for the WRS if:

1. The employee was first covered under the WRS **before July 1, 2011** and has worked more than:
 - a. 600 hours (non-teachers) during the preceding 12-month period; or
 - b. 440 hours (teacher) during the preceding 12-month period.
2. The employee was first covered under the WRS **on or after July 1, 2011** and has worked more than:
 - a. 1,200 hours (non-teachers) during the preceding 12-month period; or
 - b. 880 hours (teacher) during the preceding 12-month period.

Employees who have worked both the required hours and met the one-year duration must be enrolled on their one-year anniversary date since both eligibility criteria have been met.

If the agency determines that the employee is NOT eligible for the WRS on the one-year anniversary date, the agency is responsible for continued monitoring of WRS eligibility on a rolling 12-month basis. Employees, who work the required hours in any 12-consecutive month period, must be enrolled in the WRS on the day **AFTER** they have worked the required number of hours.

WRS eligibility is determined on a per agency basis. Only hours worked at a specific agency count towards WRS eligibility at that agency. An employee who works at multiple agencies may be eligible for WRS at one agency but not the other.

NOTE: If the employee is currently under the WRS but you determine that the employee should have been covered under the WRS prior to the current WRS begin date, the WRS begin date must be corrected and all WRS contributions owed must be collected. All previously established benefit effective dates are maintained – do not change coverage effective dates due to change in WRS begin date.

Rehired Annuitant WRS Eligibility

The employment and WRS eligibility of rehired annuitants is outlined in [Chapter 15](#) of the WRS Administration Manual. Please see Tables 15.1 and 15.2 to review detailed information about when a Rehired Annuitant has the option to elect WRS coverage and when a Rehired Annuitant is required to re-enroll in the WRS.

If a rehired annuitant is not eligible to participate in the WRS at hire, the annuitant may be able to elect participation or be required to participate in the WRS when expectations change, at the one-year anniversary or at any point during a rolling 12-month lookback period. **Once an annuitant either elects to or is required to participate in the WRS, the annuitant must complete a [Rehired Annuitant Election Form \(ET-2319\)](#) and ETF will determine the WRS begin date.**

Rehired annuitants who meet the thresholds listed in Chapter 15 of the WRS manual will appear on the WRS Lookback report. The following is a summary of the hour thresholds:

1. If the employee terminated prior to July 2, 2013, the annuitant is **eligible** to re-enroll in the WRS once the annuitant has worked more than:
 - a. 600 hours (non-teachers) during the preceding 12-month period; or
 - b. 440 hours (teacher) during the preceding 12-month period.
2. If the employee terminated on or after July 2, 2013, the annuitant is **required** to re-enroll in the WRS once the annuitant has worked more than:
 - a. 1,200 hours (non-teachers) during the preceding 12-month period; or
 - b. 880 hours (teacher) during the preceding 12-month period.
3. If the employee terminated on or after July 2, 2013, the annuitant is **eligible** to re-enroll in the WRS once the annuitant has worked more than:
 - a. 600 hours, but less than 1,200 hours, (non-teachers) during the preceding 12-month period; or
 - b. 440 hours, but less than 880 hours, (teacher) during the preceding 12-month period.

Per direction from the Department of Employee Trust Funds (ETF), if you identify a rehired annuitant who is either required to or can elect to go under the WRS, **the WRS enrollment is PROSPECTIVE ONLY**. Rehired annuitants will not be retroactively covered by the WRS.

UNDERSTANDING HOW AN EMPLOYEE APPEARS ON THE WRS LOOKBACK REPORT

The report looks back 365 days from the Pay Period End Date that you use to run the report and will show any employee who is:

- Not currently enrolled under the WRS; and
- In an employment class that is eligible for coverage by the WRS; and
- Actively employed on the Pay Period End Date that you use to run the report; and
- Was **actively employed** 365 days prior to the Pay Period End Date used to the run the report

Employees may show up on the report and be grossly over their hour threshold. The WRS eligibility is based on an employee's employment after a year **and** reaching their hour threshold.

The following employment classes are potentially eligible for the WRS and are analyzed by the WRS Lookback report:

- Permanent
- Seasonal
- Project Project
- Project Permanent
- LTE
- Unclassified
- Unclassified LTE
- Elected

The WRS eligibility threshold applied to the employee is based on the value in the Elig Config 1 field on the Benefit Program Participation page in Job Data as of the Pay Period End Date used to run the report and whether the employee has a job code that is eligible for coverage under the Teacher WRS category. If the value in Elig Config 1 is not correct, the WRS Lookback report may not apply the correct WRS eligibility hours threshold.

Report Logic and Needed Action

Elig Config 1 Field	Definition	Hours Threshold (non-teacher)	Hours Threshold (teacher)	Action Required
NOTELIG	Not Eligible Default	600	440	Agency must do WRS service check to determine correct NOTELIG value – then determine next step
NOTELIGLEG	For use by Legislature Only - Legislature-Annuitant Elected	600	440	Legislature - TBD
NOTELIG_90	Not WRS eligible - No WRS service before 7/1/11	1200	880	<ul style="list-style-type: none"> Required to go under WRS (update job data) Notify employee and offer benefits
NOTELIG_91	Not WRS Eligible - Has WRS service before 7/1/11	600	440	
NOTELIG_92	Rehired Annuitant termed before 7/2/13	600	440	<ul style="list-style-type: none"> Notify annuitant of eligibility Annuitant must complete Rehired Annuitant Election Form If going under WRS, update job data once ETF confirms WRS start date and offer benefits WRS begin date is PROSPECTIVE only
NOTELIG_93	Rehired Annuitant termed all WRS-covered employment after 7/1/13 and had WRS service prior to 7/1/11	1200	880	<ul style="list-style-type: none"> Required to go under WRS (update Job Data once WRS begin date confirmed by ETF) Notify employee – must complete Rehired Annuitant Election Form Offer benefits WRS begin date is PROSPECTIVE only
NOTELIG_94	Rehired Annuitant termed all WRS-covered employment after 7/1/13 and had NO WRS service prior to 7/1/11	1200	880	

The job codes that are identified as **eligible** (not necessarily automatically subject to;) for the teacher hours threshold are:

- | | |
|--|--|
| 53520 – Assistant Dean of Students | 59480 – Education Consultant |
| 57800 - Librarian | 59490 – School Admin Director |
| 58200 - Teacher | 59540 – Education Admin Director |
| 58220 – Teacher Supervisor | 59800 – Dean of Students |
| 58900 – Support Admin Assistant | 59900 – Education Specialist |
| 59050 – Technical College System Administrator | 59960 – Education Program Specialist |
| 59101 – Educational Assistant - Entry | 98414 – Indef AG Appt – 20.923 (4) ESG 4 |
| 59160 – Education Director | |

Note: You will want to confirm the employment category (based on the guidelines in [Chapter 4](#) of the WRS Manual) should be subject to the teacher thresholds for these job codes.

IMPORTANT: Prior to putting an employee under the WRS, you should always do a prior WRS service check to confirm that the correct NOTELIG value is in Elig Config 1 and the correct hours threshold was applied.

HOW TO RUN WRS LOOKBACK REPORT

Role: Agency Benefits Specialist

The agency should run the WRS Lookback report on the Monday after the payroll confirm.

Excel Settings to Run WRS Lookback Report

If you have modified your Excel settings per the [POTT File Upload Formatting Job Aid](#) because you upload files via POTT, you will need to change the settings before you run the WRS Lookback report. If you do not change the settings, the file will come out in .csv format and it won't be formatted correctly.

1. Click on your Start Button > Control Panel > Region and Language
2. Click on Additional Settings
3. If the List Separator is currently a pipe (|), you need to change it to a comma (,)

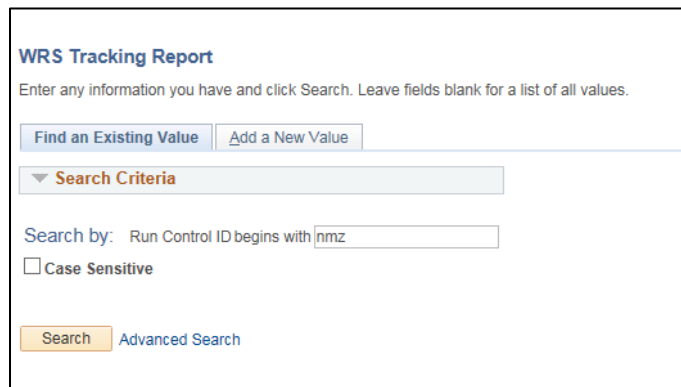


5. Click "Apply" to apply the change
6. Click "Okay"

If you need to upload a file to POTT, you will have to follow the process in the [POTT File Upload Formatting Job Aid](#) to change the List Separator back to a pipe (|).

Running the WRS Lookback Report

1. Navigate to the Workforce Administrator Homepage – Benefit Administration Dashboard – Benefit Enrollments Tile – Reports & Queries – **WRS Tracking Report**.
2. Enter your Run Control ID. The first time you run this report, you will need to create a run control by clicking on the Add a New Value tab and entering the information. Once you enter your Run Control ID, click Search.



WRS Lookback Report

- Enter the pay period end date and the 5-digit Business Unit. Only pay end dates are allowed. If you receive an error message in response to entering a pay end date, that means that the WRS Transaction Load process has not yet run for that pay period. You can also enter Department, Location Code or Empl ID if you want to narrow down the results. The results of this report are based on your row-level security.

- Click Run
- Select Type = Web and Format = CSV. Click OK.

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	WRS Tracking Report	WIBNR532	SQR Report	Web	CSV	Distribution

- Click on the Process Monitor to see your results. Click the Refresh button until Run Status = Success and Distribution Status = Posted. Click on the Details link to get to the report.

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	1894582		SQR Report	WIBNR532	TESCHDMWLS	04/24/2019 2:46:06PM CDT	Success	Posted	Details

- Click on View Log/Trace

Date/Time		Actions	
Request Created On	04/24/2019 2:46:09PM CDT	Parameters	Transfer
Run Anytime After	04/24/2019 2:46:06PM CDT	Message Log	
Began Process At	04/24/2019 2:46:30PM CDT	Batch Timings	
Ended Process At	04/24/2019 2:46:58PM CDT	View Log/Trace	

- Click on the file that ends .csv to see the report results

View Log/Trace

Report

Report ID	1521596	Process Instance	1894582	Message Log
Name	WIBNR532	Process Type	SQR Report	
Run Status	Success			

WRS Tracking Report

Distribution Details

Distribution Node	PHRINT	Expiration Date	07/23/2019
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File List

Name	File Size (bytes)	Datetime Created
SQR_WIBNR532_1894582.log	1,675	04/24/2019 2:46:58.181435PM CDT
wibnr532_1894582.csv	3,198	04/24/2019 2:46:58.181435PM CDT
wibnr532_1894582.out	1,538	04/24/2019 2:46:58.181435PM CDT

Distribute To

Distribution ID Type	Distribution ID
User	TESCHDMWLS

- Open the file and save as an Excel file.

Note: Once you run the report, the results will also appear in Report Manager.

HOW TO READ WRS LOOKBACK REPORT AND CONFIRM WRS ELIGIBILITY

Lookback Report

Multiple jobs

- See one row per job and hours are aggregated by BU
- The output sorts by department so you would need to sort by name or Empl ID to see the multiple rows together

Agency	DeptID	Description	EmplID	Last Name	First Name	Class	Barg Unit	Multi Jobs	Job Code	Job Title	Hours Since Dt	Check Date	Retirement Category	FTE	WRS Elig Hrs	Threshold	Teacher
37000	3701081101	LL Administration	1000000000	Justin	Justin	LTE	7 Y		13402	IS COMP SVCS SE	7/22/2016	8/3/2017	NOTELEG_90	0	1137.75	1200	N
37000	3701111101	WM Administration	1000000000	Justin	Justin	LTE	7 Y		13662	IS BUSINESS AUT	7/22/2016	8/3/2017	NOTELEG_90	0	1137.75	1200	N
37000	3701112303	WM Upper Chippewa Ar	1000000000	John	John	LTE	6 Y		90660	WILDLIFE TECHN	7/22/2016	8/3/2017	NOTELEG_92	0	808	600	N
37000	3701112303	WM Upper Chippewa Ar	1000000000	Brian	Brian	LTE	6 Y		90660	WILDLIFE TECHN	7/22/2016	8/3/2017	NOTELEG_90	0	1179	1200	N
37000	3701112405	WM Game Farm	1000000000	Isaac	Isaac	LTE	6 Y		90660	WILDLIFE TECHN	7/22/2016	8/3/2017	NOTELEG_90	0	803.75	600	N
37000	3701132211	SF Kettle Moraine No	1000000000	Douglas	Douglas	LTE	15 Y		56361	PARKS REC SPEC	7/22/2016	8/3/2017	NOTELEG_92	0	922	600	N
37000	3701132211	SF Kettle Moraine No	1000000000	Douglas	Douglas	LTE	3 Y		76125	FACILITIES REPA	7/22/2016	7/6/2017	NOTELEG_92	0	922	600	N
37000	3701132211	SF Kettle Moraine No	1000000000	Jeri	Jeri	LTE	6 Y		90700	FORESTRY TECHN	7/22/2016	8/3/2017	NOTELEG_92	0	737	600	N

Rehired Annuitants

- If an annuitant is required to go under or elects to go under WRS, the WRS enrollment will be PROSPECTIVE only. ETF will work with you to set the WRS begin date
- Will continue to appear on the report – No way to remove them from report
- We are only including hours from when the annuitant was not covered by the WRS but there are limitations – if they retired in 2015 (pre-STAR), there is no way for the report to pull in the retirement date

Check date column – This is the last check that the employee received. Use this to help determine if the employee truly is still active

Retirement Category Verification

If you see that the WRS Elig Hours (Column P) is greater than the Threshold (Column Q), do a prior service check on the employee to verify that the correct threshold is being used based on the Elig Config 1 value. The value in Elig Config 1 could be incorrect, and therefore applying the incorrect threshold to the employees WRS eligible hours. If you find that the Elig Config 1 value is incorrect, please submit a ticket to have the value updated.

WRS Eligible Hours May be Overstated

The report will look back 365 days and include all hours in the pay period that includes the date that was one year ago. The report will also include all hours worked in the most recent pay period that is included in the report. This means that the report may say the person is eligible for the WRS but if the employee is close to the hours threshold, you should verify that the employee is truly eligible for the WRS. You can use WI_WRS_LOOKBACK_DAY to verify that the employee is eligible for WRS.

WI_WRS_LOOKBACK_DAY Query

You can use the WI_WRS_LOOKBACK_DAY query to see the hours by day that are pulling in from STAR.

- Empl ID = Empl ID of employee you are evaluating for WRS eligibility
- 1. Begin Date = Enter beginning of pay period that encompasses the 365 days prior to the current pay period end date to get all hours in STAR or the hire date.

You will also use this query to help you determine the total number of hours and earnings that should be covered by the WRS. The amount in **WRS Elig Hours** (column E) tells you the total number of hours that could be covered by the WRS and the **WRS Elig Earnings** (column F) tells you the total earnings that could be covered by the WRS that day. To get the full amount of WRS eligible hours and earnings, you will need to add them up.

Sample Query Results

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	

HOW TO UPDATE JOB DATA TO ENROLL THE PERSON IN WRS

When an employee goes under the WRS via Lookback, the following Job updates need to occur. If you are unable to update these, please submit a ticket to have Central Benefits update job data. You will need to include the information below:

1. Navigate to Workforce Administrator Homepage – Benefit Administration Dashboard – Benefit Enrollments Tile – Employee Data – **Job Data**.
2. Enter the Empl ID and click Search
3. Add a row to job data with an effective date of the 1st day of WRS coverage
 - a. **Action** = Data Change
 - b. **Reason** = Benefits Eligibility Config

4. Click on the **Employment Data** link at the bottom of the page and change the benefits service date to the WRS begin date
 - Go to the Benefits Service Date
 - Check the Override Box
 - Enter the WRS Begin Date

Organizational Assignment Data ?						
Instance Record						
Last Assignment Start Date	04/17/2016			First Assignment Start	04/17/2016	
Assignment End Date						
Home/Host Classification	Home			Years	Months	Days
Company Seniority Date	04/28/2018	<input checked="" type="checkbox"/> Override		0	11	27
Benefits Service Date	04/28/2019	<input checked="" type="checkbox"/> Override		0	0	0
Seniority Pay Calc Date	04/28/2018	<input checked="" type="checkbox"/> Override		0	11	27

5. Click on the **Benefits Program Participation** link at the bottom of the page and enter the applicable values
 - Elg Fld 1 = WRS Category
 - Elg Fld 2 = ICI Eligibility
 - Elg Fld 3 = Required if LTE or if person required to pay less than half time rates for health (or is a craftworker who must pay the full cost of health)
6. Click Save

MULTIPLE JOBS REMINDER – if the employee has multiple jobs at one agency, Job Data must be updated for ALL jobs within the agency. Both jobs must be updated and the Benefits Service Date on both jobs must be the same date.

CALCULATING AND COLLECTING RETROACTIVE WRS CONTRIBUTIONS

If you determine an employee should have gone under the WRS retroactively, all employee and employer WRS contributions must be collected from the WRS begin date.

In order to let the employee know how much he or she is required to payback, you need to determine the total number of hours and earnings that should have been covered by the WRS. This step should have been completed when you were confirming eligibility for the WRS (use the WI_WRS_LOOKBACK_DAY query to determine total hours and earnings that should be covered by the WRS).

Calculating Retroactive WRS Contributions

The WRS contribution rates can be found on the [ETF website](#). If you have an employee that you find is WRS eligible in a previous year, please submit an SSO ticket for Central Benefits. We will work with you to get ETF updated, and get the current year updated accordingly.

Collection of Current Year WRS Contributions

If possible, the agency should collect all current year WRS contributions owed by the end of the last pay period payable within the calendar year. If the employee will be paying everything back in one or two pay periods, you can enter the amount via POTT. If the employee will be repaying over several pay periods, you can use Additional Pay or POTT.

In both situations, you will use the WAA (WRS Accumulator Adjustment) earnings code. The WAA code will:

- Automatically calculate the WRS employee and employer contributions, as well as the employer sick leave contributions based on the hours and earnings that you enter through POTT or Additional Pay. It does this by adding the hours and earnings to the WRS Accumulator.
- Take all calculated contributions on the employee's check (based on the hours and earnings added to the WRS Accumulator via the POTT)
- Update the WRS Accumulators/Transaction table so the correct hours and earnings are reported to ETF

Before you start, you need to know the total numbers of hours and earnings that should be covered under the WRS. Use the `WI_WRS_LOOKBACK_DAY` query to help you determine the amount.

Collection of Retroactive Current Year WRS Contributions via POTT

If the employee plans to pay back WRS contributions over a few pay periods, you may want to use POTT to recoup the premiums.

1. Navigate to Workforce Administrator Homepage – Benefit Administration Dashboard – Benefit Deductions Tile – POTT – Enter POTT – By Employee.
2. Click on Add a New Value
 - Enter Company
 - Pay Group
 - Pay Period End Date
 - Transaction Type = Earnings
 - Click **Add**

The screenshot shows a web form titled "Enter Payroll One Time Trans". At the top, there are two tabs: "Find an Existing Value" and "Add a New Value". The "Add a New Value" tab is selected. Below the tabs, there are several input fields: "Company" with the value "WIS", "Pay Group" with the value "255", "Pay Period End Date" with the value "08062016", "Off Cycle?" with an unchecked checkbox, "Transaction Type" with a dropdown menu showing "Earnings", and "Batch ID" with the value "NEW". At the bottom of the form, there is an orange "Add" button.

3. Enter applicable information on the Enter Payroll One Time Transaction page
 - Empl ID

WRS Lookback Report

- Empl Record
- Earnings Code = WAA (WRS Accumulator Adjustment)
- OTH Hours = the number of hours that should have been covered by the WRS
 - If you are not collecting everything at once, enter the number of hours that correspond to the WRS contributions that you want to collect for that pay period
- Amount = earnings that should have been covered by the WRS
 - If you are not collecting everything at once, enter the amount of earnings that correspond to the WRS contributions that you want to collect for that pay period – whatever dollar amount you put here – WRS contributions will be calculated on that amount
- One Time Cd = Addition

Pay Status	Erncd	Description	Oth Hrs	Amount	One Time Cd	Sepchk#
Active	WAA	WRS Accumulator Adjustment	40.00	2000.00	Addition	0
Totals						

4. In the Comments, enter the SSO ticket number associated with the transaction (if applicable), indicate if you will be making multiple adjustments through POTT and attach any other applicable information, including the spreadsheet used to calculate the total number of hours and earnings that should have been covered by the WRS.
5. Click Save
6. Click Validate
7. Click Submit

MULTIPLE JOBS REMINDER – If the employee is going under the WRS in multiple jobs at the same agency, the agency must determine the hours and earnings that should have been covered by the WRS for each Empl Record. Separate POTTs must be done for each Empl Record.

Collection of Retroactive Current Year WRS Contributions via Additional Pay

If the employee plans to pay back WRS contributions over several pay periods, you may want to use Additional Pay to recoup the premiums.

1. Navigate to Workforce Administrator Homepage – Benefit Administration Dashboard – Benefit Deductions Tile – **Create Additional Pay**
 - Enter the Empl ID
 - Click Search
2. Add a row by clicking in the + sign on the Additional Pay Line
 - **Earnings Code** = WAA
 - **Effective Date** = 1st day of the 1st pay period in which deductions should start
 - **Addl Seq Nbr** = If there are no other additional pays, it would be 1. If there are others, it would be the next available number

- **End Date** = Last day of the last pay period in which deductions should stop. **The latest end date you can enter is the end of the payroll year.** If all contributions are NOT collected by that date, the earnings code used will need to change
- **Hours** = The total number of WRS hours associated with the contributions you want to collect **PER PAY PERIOD.** Example – the employee should have had 100 hours covered by the WRS and you want to split the contributions over 4 pay periods. You should enter 25 in the “Hours” box.
- **Hourly Rate** = The hourly rate in place during the time the employee should have been covered by the WRS
- **Check the box next to “OK to Pay”**
- **Applies to Pay Periods** = Check the boxes next to First, Second and Third

3. Click Save

What if the employee has multiple salary rates during the period in which he or she should have been covered by the WRS?

There are two options:

1. Use POTT only because you don't need to enter the employee's hourly rate – just total hours and earnings.
2. Set up multiple additional pays with different hourly rates. Recommend collecting everything under the first hourly rate before starting to collect under the second hourly rate.

WRS Accumulator Adjustments on Paycheck

Below is what the WRS Accumulator Adjustment looks like in Review Paycheck for the WAA (there will be two in review paycheck – one for each week in the pay period):

Other Earnings						
Code	Description	Rate Used	Hours	Rate	Amount	Source
WAA	WRS Accumulator Adjustment	Hourly Rate	45.00		610.69	OT

Special Accumulators				
Code	Description	Hours	Earnings	Empl Record
HRS	Work Hours Only	40.00	540.00	0
SGL	SGL Eligible Earnings	109.00	1,165.09	0
WDC	Wisconsin Deferred Comp	64.00	554.40	0
WRH	WRS Hours only	85.00	1,150.69	0
WRS	WRS Eligible Earnings	109.00	1,165.09	0

Below is what the adjustment will look like on an employee’s paycheck:

HOURS AND EARNINGS					
<u>Description</u>	<u>Current</u>			<u>YTD</u>	
	<u>Rate</u>	<u>Hours</u>	<u>Earnings</u>	<u>Hours</u>	<u>Earnings</u>
WRS Accumulator Adjustment	13.160000	23.00	302.68	173.00	2,276.68
Regular Hours Worked	13.160000	148.50	1,954.26	1,473.00	18,043.31
Sick Leave			0.00	8.00	105.28

MID PAY PERIOD WRS BEGIN DATE

When an employee is put under the WRS timely (WRS begin date in a pay period that has not yet confirmed) and the WRS begin date is NOT the first day of the pay period, the system will take WRS contributions on ALL earnings payable in that pay period. You can enter a POTT using the WAA code to reduce the hours and earnings that are covered in that pay period.

Example – Employee goes under the WRS on 4-6-18 (middle of PP9). The employee worked 40 hours and had \$2000 in earnings that pay period that should NOT be covered by the WRS. You would enter a POTT with the following:

- Earnings code = WAA
- Oth Hours = (-40.00) (you enter a negative number to reduce the total hours for the pay period)
- Amount = (-2000.00) (you enter negative earnings to reduce the WRS earnings for the pay period)
- One Time Cd = Addition (you are adding a negative amount)

Once the POTT is processed, it will reduce the WRS contributions for that pay period, as well as remove the hours and earnings from the WRS Accumulator/Transaction Table.

OFFERING BENEFITS TO EMPLOYEES TIMELY PUT UNDER THE WRS

When the employee's job is updated to indicate the employee is now eligible for the WRS, this will create an ELG event. The employee must be offered benefits at this time and is required to complete paper applications to enroll (**eBenefits is NOT available**). Once all the applications are received, the agency should enter the enrollments on the ELG event. The ELG event sets the coverage effective dates the same way that a HIR event does.

LTE Reminder – if the LTE does NOT have at least 6 months of WRS state service, do NOT use the ELG event to enroll the employee in health insurance. Enter a "W" for health insurance and use a manual SHR event with an event date = the date the employee has 6 months of WRS state service, to enroll the employee (do not enter the SHR event until the month in which the employee has 6 months of service).

RETROACTIVE WRS ENROLLMENT – EMPLOYEE NOTIFICATION AND OFFER BENEFITS THROUGH EMPLOYER ERROR

Once the agency confirms that someone on WRS Lookback report is eligible for the WRS, the agency must:

- Calculate WRS contribution owed
- Notify the employee immediately upon discovery (use language in [Late WRS Discovery Employee Template](#))
- Work with employee to set up a payment plan (if applicable)
- Offer benefits to the employee

If the employee is outside of their initial 30-day enrollment period, you must:

- Offer the coverage to the employee immediately upon confirming their eligibility for the WRS
- The employee must submit an application to the agency within 30 days of the date the employee is notified
- The agency must submit the [WRS Lookback Employer Error Letter](#) and a copy of all applications to their WRS case manager at ETF.
 - The following plans allow enrollment through employer error:

- State Group Life
- Income Continuation Insurance
- Delta Dental PPO
- VSP
- Flexible Spending Accounts
- Health Insurance (eligible due to retroactive enrollment in the WRS)
- Enter the coverage in STAR PRIOR TO receiving final approval from ETF so payroll deductions can begin.
 - If the employee is enrolling in life or ICI, remember to enter the applicable ABBR (Workforce Administrator Homepage – Benefit Administration Dashboard – Benefit Enrollments Tile – Event Processing – **Update ABBRs**). See the [Benefit Event Processing Job Aid](#) for instructions.
 - The effective date of the ABBR should be the 1st day of the pay period that pays for the first coverage month.
 - Example – employee enrolls in life and ICI effective 6-1-18. The effective date of the ICI ABBR should be 5-13-18 and the effective date of the LIFE ABBR should be 4-5-18.

When someone is retroactively put under the WRS, all benefit effective dates are PROSPECTIVE. Coverage is effective on the 1st of the month on or following the receipt date of the application. You will:

- Use an ADM event to enter coverage (event date = 1st of month coverage will be effective)
 - There might be a need for several ADM events due to differing coverage begin dates
- Submit a ticket to indicate why the ADM event was used so Central Benefits can notify the vendors of the reason for the enrollment and back up the deduction begin date for any life insurance enrollments.

If the employee is not yet eligible for the employer contribution towards health insurance (after 6 months of WRS state service for LTE's), use a manual SHR event to enroll the employee in health insurance.

HOW TO HANDLE RETROACTIVELY WRS ELIGIBLE EMPLOYEES WHO HAVE NOW TERMINATED EMPLOYMENT

Upon review of the retroactive WRS Lookback report, if you find an employee was eligible for the WRS but is no longer employed, the Department of Employee Trust Funds (ETF) has determined that the employee must still be placed under the WRS and contributions are owed for that employee. This is the case even if an employee is found to have terminated within 30 days of the determined WRS begin date, since the employee would have satisfied the 30-day employment rule prior to the termination date.

If you identify one of these employees, you should:

- Submit a ticket so Central Benefits can do all necessary entry in STAR
- Include the employee's name, Empl ID, WRS begin date, values for Elig Config fields 1-3, Benefits Service Date and your calculation of missed WRS hours and earnings

Central Benefits will:

- Update the employee's Job Data and service dates
- Update the WRS Transaction Table to reflect the WRS hours and earnings that should have been covered
- Work with agency to collect any missed employee/employer contributions

WRS LOOKBACK REPORT CHECKLIST

- Run the WRS Lookback report on the Monday after payroll confirm.
- If the report indicates an employee is eligible for the WRS, validate the hours and eligibility by:
 - Doing a Prior WRS service check to make sure the correct value was in Elig Config 1 and the correct WRS hours threshold was applied
 - Running WI_WRS_LOOKBACK_DAY to see all hours worked for a date range

If you determine that an employee is eligible for the WRS:

- Determine the employee's WRS begin date
- Have HR update the job record
 - Job row effective date (this should be the WRS start date)
 - Action = Data Change; Reason = Benefit Eligibility Config
 - Update Elig Config fields 1-3 (For LTE's; other empl classes only need Elig Config fields 1-2)
 - Update the Benefit Service Date

****If the Employee has two appointments, both positions must be updated and match****

- If the WRS begin date is not the 1st day of a pay period, determine the number of hours and earnings that should NOT be covered by WRS. Submit a POTT using a WAA earnings code to reduce the total WRS service and earnings for the first pay period covered by the WRS.
- Counsel the employee and offer benefits
- Enter benefit applications on ELG event (NOT the health application unless they are enrolling in health with NO employer contribution. If they are waiting for the employer contribution, this enrollment will be entered on a manual SHR event)

ABBR Reminder – if employee enrolls in life or ICI, enter the ABBR. The effective date of the ABBR should be the 1st day of the pay period that pays for the first coverage month.

If the employee is a rehired annuitant and you determine the employee is eligible for the WRS:

- If the employee is eligible to participate in the WRS but NOT required to participate (NOTELIG_92), notify the employee of the eligibility and have the employee complete a [Rehired Annuitant Election Form](#) (ET-2319).
- If the employee is REQUIRED to participate in the WRS (NOTELIG_93/94), notify the employee and have the employee complete a Rehired Annuitant Election Form. Once ETF notifies you of the WRS begin date, follow the steps above.

REMINDER: All WRS enrollments for rehired annuitants are PROSPECTIVE only.