



- **Important Deadlines for WRS Statement of Benefits**
- **Distribution Options and Address Information**
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- **Update Employee Addresses**

Important Deadlines:

February 24, 2006 The Distribution Code/Address Option Selection form must be submitted to select a sort option for your January 1, 2006 Statements of Benefits.

March 20, 2006 All code and/or address data must be submitted based on the sort option selected above using the format explained in the Distribution Code/Address Specifications included in this bulletin. Data not meeting the specifications will be returned to you for correction.

WRS Statement of Benefits Distribution Code/Address Option Selection Form

You are responsible for distributing individual Statement of Benefits to named employees when you receive the January 1, 2006 annual WRS Statement of Benefits. To facilitate the distribution process, please select one of the four options on the attached *Distribution Code/Address Option Selection Form*. The options are explained in detail below.

THE FOUR OPTIONS ARE:

OPTION A: Distribution Codes

Under this option, you receive your statements in alphabetical order by employee last name within a distribution code order specified by you. As an example, you could provide us with distribution codes that group your employees' statements by departments, individual buildings where employees work, or by different cities where employees work.

OPTION B: Employee Home Addresses

Under this option, you receive your statements by your employees' home addresses in zip code order. This enables you to attach postage and mail the statements directly to employees, rather than distributing statements at the work sites. If you select this option, place your return mailing address label over the ETF return address.

OPTION C: Sort by Distribution Codes and Also Print Home Addresses

Under this option, you receive your statements in alphabetical order within distribution code order, with

home addresses of your employees printed on the statements. This allows you to distinguish between different buildings/work sites, but retain the option to mail some statements to employees who might not be present at the time you distribute statements.

OPTION D: Sort in Alphabetical Order

Under this option, you receive your statements in alphabetical order. Distribution codes and/or addresses of employees are printed on the statements, provided you supply ETF with that information.

Mail or fax the attached *Distribution Code/Address Option Selection* form to the Department of Employee Trust Funds (ETF) by February 24, 2006, to the address indicated below. When completing this form, please provide your Wisconsin Retirement System (WRS) Employer Identification Number (69 036 XXXX XXX) and check the appropriate box to indicate whether you will be submitting these codes and/or addresses data using disk, paper, or File Transfer Protocol (FTP). ETF encourages you to use electronic reporting to increase accuracy and efficiency. We continue to receive positive feedback regarding the FTP transmission method of sending the data files.

PLEASE REMEMBER:

- You must complete the attached *Distribution Code/Address Option Selection* form and submit the codes/addresses data file (even if you have submitted one in the past).
- Provide ETF with your option selection form by February 24, 2006, even if you request that the statements arrive in straight alphabetical order by employee last name (Option D).

Distribution Codes/Employee Addresses

ETF requests that all WRS employers report their employees' addresses for purposes of updating WRS member files by March 20, 2006. Instructions for using an Excel spreadsheet to create data files are attached.

- If you are using an Excel spreadsheet to submit codes and addresses please follow the instructions on the enclosed sheet.
- Please send codes and addresses as one file.

The *Distribution Code/Address Specifications for Statement of Benefits* form (ET-9060, rev. 01/2006) is included with this bulletin. This form contains the reporting format/instructions for use when reporting codes and/or addresses via paper, disk, and FTP.

NOTE: Files not meeting the reporting format described on the ET-9060 will be returned to you for correction. Corrections will NOT be made at ETF.

Employers submitting distribution codes/addresses on paper reports must follow the same data format as disk and FTP reporters.

If you have questions regarding Statement of Benefit deadlines, statement distribution, Excel Spreadsheet instructions, or FTP, contact Marilyn Lim. Please address all correspondence related to Statement of Benefits codes and addresses to:

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P. O. Box 7931
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