



# Employer *Bulletin*

Employer Communication Center (608) 266-3285 Toll free: 1-877-533-5020 <http://etf.wi.gov>

## WRS Annual *Statements of Benefits* Enclosed

A personalized Wisconsin Retirement System (WRS) annual *Statement of Benefits* (dated January 1, 2013) is enclosed for each of your active employees with WRS contribution balances as of December 31, 2012. Please distribute these according to the instructions and guidelines provided below.

## Instructions and Guidelines for Statement Distribution

Employers are responsible for distributing the *Statements of Benefits* to their active WRS covered employees. You may send the statements to your employees via U.S. mail in the envelopes provided, just add postage. Please be sure to send statements to employees on leaves of absence.

The *Statements of Benefits* are **confidential**; they should not be opened by anyone but the participant.

If a statement is included for an employee who recently terminated or for whom a termination report has not yet been sent to ETF:

- Mail the statement to the participant.
- Send a termination report to ETF immediately (if one has not already been submitted). Please refer to Chapter 9 "Periodic Employee Transaction Reporting" in the *WRS Administration Manual* (ET-1127) for methods available for reporting terminations. Your report should include the employee's employment termination date, applicable WRS earnings and hours of service, and last known address. ETF will then update the employee's WRS account information.

**Note:** *Statements of Benefits* for employees working for more than one WRS employer are sent to the employer with the employee's **most recent WRS begin date or employment category change date**. This is not necessarily the primary employer.

January 1, 2013 *Statements of Benefits* will not be sent to you for:

- Employees who terminated employment and for whom you reported the employment termination to ETF prior to the statement printing date. In these cases, ETF will send statements directly to the employee's mailing address.
- New WRS participants who enrolled in late December 2012 whose first wages were paid in January 2013. These employees will not receive statements because no WRS contributions were paid in 2012.
- Employees who have applied for a retirement benefit.

## Employees Should Carefully Review Statements

The annual *Statement of Benefits* provides WRS participants the opportunity to review important WRS account information that will eventually be used in benefit calculations. Therefore, we ask that you encourage employees to carefully review their statements and the enclosed supporting explanation. Most questions can be answered by reading this information or visiting ETF's Internet

site and viewing the online video, *Your Annual Statement of Benefits*. Find it in our video library at: <http://etf.wi.gov/webcasts.htm> (click on "Participants" and go to the program). We recommend the employee have their *Statement of Benefits* in hand when viewing the video.

Your employees should contact you for clarification of the WRS information that you have reported to ETF: employment category, earnings, and hours worked (ETF converted the hours worked to WRS creditable service). It is critical that you immediately correct any reporting errors. Please refer to Chapter 11 of the *WRS Administration Manual* (ET-1127) for instructions and guidance on making prior year account adjustments.

Please notify your employees that **after** terminating all WRS covered employment they must notify ETF of any address changes so they will continue to receive their annual *Statement of Benefits* (until a benefit is taken) and other communications from ETF.

## Employer Feedback on Statement of Benefits Format

ETF continually seeks to improve the annual *Statement of Benefits* format and we welcome your feedback. Please contact the Office of Budget and Trust Finance at: [StatementInfo@etf.wi.gov](mailto:StatementInfo@etf.wi.gov) with any comments or questions.

## Employers Should Now Use ETF's Main Number

ETF took the step of consolidating to a single phone number for members and employers, both employees and employers may now call either toll free at (877) 533-5020 or locally at (608) 266-3285; this change was effective March 8, 2013. For logon and password support, continue to call (866) 843-9724, (608) 264-9181 (locally) or e-mail [ETFOnLineHelp@etf.wi.gov](mailto:ETFOnLineHelp@etf.wi.gov).

### Redesigned Telephone Message Center

ETF has also redesigned its Telephone Message Center to provide important current messages for members and employers. Use this new service by dialing ETF's main number (noted above), then follow the prompts. Employers should discontinue the distribution of the *Telephone Message Center* brochure (ET-7348); this brochure is now obsolete.

Thank you for your patience as we implement this service.

## Questions

Employees and Employers having questions after reviewing the information supplied with the *Statements of Benefits* may contact ETF toll free at (877) 533-5020, or by calling (608) 266-3285 in the Madison area.

The Department of Employee Trust Funds does not discriminate on the basis of disability in the provision of programs, services or employment. If you are speech or hearing impaired and need assistance, call the Wisconsin Relay Service toll free at 7-1-1 or 1-800-947-3529 (English) 1-800-833-7813 (Español). If you are visually or cognitively impaired, call 1-877-533-5020 or (608) 266-3285 locally. We will try to find another way to get the information to you in a usable form.

This *Employer Bulletin* is published by the Wisconsin Department of Employee Trust Funds. Questions should be directed to contact persons listed in the *Bulletin*. Employer agents may copy this *Bulletin* for further distribution to other payroll offices, subunits or individuals who may need the information. Copies of the most recent *Employer Bulletins* are available on our Internet site at the following URL: <http://etf.wi.gov/employers.htm>

Wisconsin Department of Employee Trust Funds  
P.O. Box 7931  
Madison, WI 53707-7931

**Note: The following information pertains to employers with fiscal year employees and employers who have electronically submitted late reported earnings (LRE) in 2013 through the Online Network for Employers (ONE).**

## **Notice about Discrepancy on Annual *Statement of Benefits* for Employees who had LRE Adjustments**

Each year, the Department of Employee Trust Funds (ETF) prepares *Statements of Benefits* for your employees. The statements provide information regarding your employees' Wisconsin Retirement System (WRS) account balances, creditable service, beneficiaries and more.

The purpose of this '*Notice*' is to make you aware of an issue on the statements affecting employees for whom:

- LRE adjustments were submitted covering the period July through December 2011, i.e., the 2011-2012 fiscal year, or
- LRE adjustments were electronically submitted in 2013 through ONE.

### **Description of Discrepancy:**

Employee earnings displayed in Section 1 – '2012 Earnings and Service' on the front of the statement will not match the three-high years of earnings displayed in Section 8 – 'Formula Benefit Data' on the back of the statement if you reported a LRE adjustment for July-December of 2011, or electronically submitted LRE adjustments via ONE in 2013.

This is not a new occurrence; however, the increase in the number of LRE adjustments to 2011 and employers' use of the new LRE application on ONE in 2013 (prior to the statements being generated) may result in questions from your employees regarding the discrepancy.

### **Cause of the Discrepancy:**

Section 1 – '2012 Earnings and Service' reflects the current year data submitted per employee for 2012, either through termination or annual reporting; however, it does not reflect any LRE adjustments that may affect the applicable year. ETF is in the process of making system changes to reflect both recent law changes and display the most up-to-date information in both sections of the statements. Once we complete implementation of the system changes, discrepancies on the statements will no longer occur.

If your employees ask about the potential mismatch of data displayed on the front and back of the statement, please advise them that ETF has the correct information on file and will correctly calculate their account balance and benefit at the time of retirement. In addition, please inform employees that ETF will fix the display issue by next year's statements.

### **Contact:**

Questions regarding the contents of this *Employer Bulletin* should be directed to the Employer Communication Center, toll free at (877) 533-5020 or locally at (608) 266-3285.

Employers: Please post and/or share this information with all of your employees.



## Department of Employee Trust Funds

# ***STATEMENT OF BENEFITS***

Did you know...

You can watch the Department's online video, ***Your Annual Statement of Benefits***, from any computer with a high speed Internet connection.

The video is a step-by-step explanation of each section of the *Statement of Benefits*.

To view ***Your Annual Statement of Benefits*** online, go to the Department's Web site <http://etf.wi.gov/webcasts.htm> and select the video catalog for "participants".

Viewing tip: Have your *Statement of Benefits* in-hand while viewing the program.

## **NOTICE**

### **Employers Should Now Use ETF's Main Number**

Effective Friday, March 8, 2013, the Department of Employee Trust Funds (ETF) took the step of offering one phone number for members and employers: toll free (877) 533-5020 or (608) 266-3285 for those in the Madison area.

For logon and password support, continue to call (866) 843-9724, (608) 264-9181 (locally), or e-mail [ETFOnLineHelp@etf.wi.gov](mailto:ETFOnLineHelp@etf.wi.gov).

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