



Employer *Bulletin*

Employer Communication Center 608-266-3285

Toll free: 1-877-533-5020

etf.wi.gov

Important Deadlines for WRS Statement of Benefits Distribution Code/Address Reports

As a WRS employer, you are responsible for distributing the Wisconsin Retirement System (WRS) *Annual Statements of Benefits* to your active employees. The statements, dated January 1, 2014, will be sent to you following completion of the reconciliation process. To assist in the distribution of these statements, please review the **sorting options** offered by the Department of Employee Trust Funds (ETF), the **detail** for each option and the **important deadlines** relative to address reporting and the statement distribution process.

ETF can collect employee address data and distribution codes from the annual report to be used on the WRS *Annual Statements of Benefits*. If you submit this information on your annual report, no additional file submission is necessary unless you would like to update this information.

Important Deadlines

- February 28, 2014:

Deadline for submitting the [Statement Sort Option Selection form](#) (ET-9061). This form determines how your employees' statements will be sorted when they are delivered in April.

On this form, you will select a sort option for your January 1, 2014 *Annual Statements of Benefits*. **If you do not return form ET-9061 by the due date, ETF will use the same sort option you chose for 2013. In the absence of an option code having been selected for 2013, ETF will automatically default to Option D, Alphabetical Order, to sort your employees' statements.**

- March 14, 2014:

Deadline for submitting all Distribution Code and Address Data (CDAD) reports to ETF. This file is required to print addresses and distribution codes on the statements if you do not include them on your annual report.

Statement Sort Option Selection Form (ET- 9061)

The [Statement Sort Option Selection form](#) (ET-9061) can be accessed at:

<http://etf.wi.gov/publications/employer.htm>.

Your completed form instructs ETF how to sort your active employees' January 1, 2014, WRS *Annual Statements of Benefits*. For your convenience, the statements will be printed and delivered in the order indicated on the form. Please complete and return the form to ETF by mail, fax or e-mail by February 28, 2014.

Please select one of the four sort options described below by checking the appropriate box on the form. If you do not return form ET-9061 by the due date, ETF will use the same sort option you chose last year. In the absence of an option code having been selected for 2013, ETF will automatically default to Option D, Alphabetical Order, to sort your employees' statements.

Note: "Distribution Codes" are codes that you designate to help sort your employees' statements when they are delivered in bulk. For example, distribution codes could signal "School A" or "School B," or list the individual employee's department. They are not required but can be very helpful when distributing the statements.

OPTION A: Distribution Codes Order:

You will receive the statements in alphabetical order by employee last name, within a distribution code order specified by you. 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 in ZIP Code Order:

You will receive the statements sorted by your employees' home addresses in zip code order. The address sort option enables you to attach postage and mail the statements directly to employees, rather than distributing statements at the work sites. The statements will be printed with your return address displayed in the return address window of the envelope.

OPTION C: Sort by Distribution Codes with Home Addresses Printed:

You will receive the statements in alphabetical order within a distribution code order, with home addresses of your employees printed on the statements. This allows you to distinguish between different buildings or 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:

You will receive the statements in alphabetical order by last name. Distribution codes and/or addresses of employees can be printed on the statements, provided you supply ETF with that information.

Mail, fax or e-mail the [Statement Sort Option Selection form](#) (ET-9061) to ETF by February 28, 2014, using the address or number indicated on the form. When completing this form, please provide your WRS Employer Identification Number (69 036 XXXX - XXX).

Distribution Code/Address Data (CDAD) Specifications Form (ET-9060)

If you intend to submit a CDAD report, it must be submitted by **March 14, 2014**.

The CDAD report must follow data format specifications defined in the [Distribution Code/Address Data Specifications for WRS Statement of Benefits form](#) (ET-9060). This form also contains instructions for using an Excel spreadsheet to create the CDAD report in an electronic format acceptable by ETF. Form ET-9060 can also be found at:

<http://etf.wi.gov/publications/employer.htm>.

Note: Files not meeting the reporting format will be returned to you for correction. Corrections will NOT be made at ETF.

You are required to keep a copy for your records of all reports sent to ETF as reference to help resolve problems that may exist in the file.

Questions regarding this *Employer Bulletin* should be directed to the Employer Communication Center toll free at 1-877-533-5020 or locally at 608-266-3285; or you may e-mail CDADinfo@etf.wi.gov.

ETF 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.