



Employer *Bulletin*

Employer Communication Center 608-266-3285

Toll free: 1-877-533-5020

etf.wi.gov

WRS Annual *Statements of Benefits* Enclosed

Wisconsin Retirement System (WRS) annual *Statements of Benefits* (dated January 1, 2014) will soon be delivered for employer distribution to active employees with WRS contribution balances as of December 31, 2013. Once received, 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. You must 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, 2014 *Statements of Benefits* will not be sent to you for:

- Employees who terminated employment. In these cases, ETF will send statements directly to the employee's mailing address.
- New WRS participants who enrolled in late December 2013 whose first wages were paid in January 2014. These employees will not receive statements because no WRS contributions were paid in 2013.
- Employees who have applied for a retirement benefit.
- Rehired annuitants who took their initial retirement benefit after July 1, 2013.

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 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 Trust Finance at StatementInfo@etf.wi.gov with any comments or questions.

Employees Working in More Than One Employment Category

Wisconsin Statute § 40.02 (17) limits WRS creditable service to one year per annual earnings period. WRS service is credited to the calendar year **or** the fiscal year annual earnings period, depending on the employee's employment category. Approximately 900 WRS participating employees simultaneously perform both calendar year and fiscal year service, either with the same employer or with multiple employers.

Prior to 2013, the automated service crediting program was unable to adjust the simultaneous calendar year and fiscal year service for these approximately 900 employees. The system credited their accounts with the total calendar year service **and** the total fiscal year service, resulting in their *Statements of Benefits* service balance being inflated. Service was then manually adjusted following distribution of the statements.

These adjustments have now been automated. Service on the 2014 statements is the most accurate to date. Because the January 1, 2014 statements will reflect both 2012 and 2013 service adjustments for these 900 participants, these employees may question their lower than expected service total. Please direct these employees to [contact](#) the Employer Communication Center at the number provided below.

Note: This was a one-time adjustment, resulting in the statements containing two years worth of service corrections. From this statement forward, the total creditable service for simultaneous service participants will be accurately adjusted prior to the distribution of the statements.

Questions

Employees *and* employers having questions after reviewing the information supplied with the *Statements of Benefits* may contact ETF toll free at 1-877-533-5020 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 ETF. If you have any questions, please contact the Employer Communications Center toll free at 1-877-533-5020 or locally at 608 266-3285. 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 etf.wi.gov/employers.htm.

Wisconsin Department of Employee Trust Funds
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Madison, WI 53707-7931
etf.wi.gov

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.



Important Employer Information Reminder

Employer Bulletin Mailings Discontinued; Since June 1, 2013 Exclusive Distribution Method will be ETF E-mail Updates

Effective June 1, 2013, the Department of Employee Trust Funds (ETF) began delivering *Employer Bulletins* and other employer announcements **exclusively** through ETF E-mail Updates. ETF E-mail Updates is an automated system that uses e-mail to notify interested parties about specific topics when new information is posted to ETF's website. When either a new *Employer Bulletin* or an employer announcement is available at etf.wi.gov, subscribers receive an e-mail with a link to it. This modernization effort eliminates the expense of distributing paper *Employer Bulletins* and results in timely bulletin delivery. There is no charge to subscribe to this service.

All employer agents should already have followed the steps outlined below even if previously subscribed to ETF E-mail Updates. The topics agents subscribe to are new and will allow for more extensive communication from ETF.

Though we encourage all employer agents to subscribe through the process below, we also suggest that your organization subscribe a shared, general e-mail address that may be accessed by others when an employer agent is unavailable. It is the employer agent's responsibility to maintain a working e-mail address in the ETF E-mail Updates system.

How to Subscribe:

- TYPE <http://etf.wi.gov/employer-updates.htm> into your Internet BROWSER.
- Click on an Employer Bulletin link that represents a program your organization offers.
- Enter your e-mail address and click the Submit button.

Local Employers: Repeat the steps above selecting the Local Employer Bulletin for each ETF-administered program your organization offers. Local employers should **return** to <http://etf.wi.gov/employer-updates.htm>, as these topics **do not** appear in the Quick Subscribe page.

State Employers: Choose only "State Employer Bulletins."

Prevent E-mails From Delivery to SPAM Folder:

Add etfwi@public.govdelivery.com to your e-mail address book to prevent Employer Bulletins from ending up in a SPAM folder. If you use a spam filter, add etfwi@public.govdelivery.com to the list of approved for delivery addresses (also known as a whitelist).

If you have questions, please call the Employer Communication Center:
1-877-533-5020 or locally at 608-266-3285.