

## **CHAPTER 3 – PREVIOUS SERVICE & BENEFIT INQUIRY APPLICATION**

<b>300</b>	<b>Introduction</b>
<b>301</b>	<b>Validating Inquiry System Connection</b>
<b>302</b>	<b>Insurance Eligibility</b>
<b>303</b>	<b>Previous Service Information</b>
<b>304</b>	<b>Instructions on Determining WRS Previous Service</b>
<b>305</b>	<b>Explanation of Terms</b>
<b>306</b>	<b>Message</b>
<b>307</b>	<b>Sample Previous Service Screen</b>

### **300 Introduction**

The information appearing on the Online Network for Employers (ONE) WRS Previous Service & Benefit Inquiry application is extracted from WRS participants' employment and benefit history data maintained on ETF's Wisconsin Employee Benefit System (WEBS). The information displayed is updated as a result of changes submitted by current or past employers, ETF, or the participant that may have been entered since you first accessed the participant's account. As a result, a participant's benefit information is not static. Therefore, it is recommended that you print and date a copy of the page for your records. A sample WRS Previous Service & Benefit Inquiry screen appears at the end of this Chapter

### **301 Validating Inquiry System Connection**

After accessing the Online Network for Employers (ONE) site and logging into the Prior Service & Benefit Inquiry application, if you are or were in a WRS position you can verify that the site is operational by entering your own Social Security Number (SSN) in the space provided, selecting **Inquire**, and reviewing your own WRS previous service benefit information. If the information displays, the ONE site is operational. If you get the message, "No SSN on file" you may contact the Employer Communication Center for assistance toll free at (888) 681-3952 or locally at (608) 264-7900.

If you have difficulty accessing the ONE site and an error message appears, record the error message description and number. Use the following chart to determine who to contact for the specified situation or screen print the error message to fax to the appropriate contact person. Refer to Appendix D for a list of possible Message Codes. Please have your Logon ID, PIN number, and Password Identifier available when requesting help.

SITUATION	RESOLUTION	CONTACT
You attempt to access a ONE application and a message appears indicating that you are not authorized.	You cannot access a ONE application until you have submitted a Security Agreement to ETF and it has been approved.	ETF's Employer Communication Center Toll free: (888) 681-3952 Local: (608) 264-7900
You have obtained your Logon information and when you insert the information a message appears indicating that you do not have access.	Insert your Logon ID and password again.	ETF Help Desk: Toll free: (866) 843-9724 Local: (608) 264-9181
After accessing the ONE site a message appears indicating that the site is unavailable or the screen is blank.	Exit the ONE site and try to access the site again.	ETF Help Desk: Toll free: (866) 843-9724 Local: (608) 264-9181
You forgot your password or are unable to change your password.	Have your Logon ID and Pin number readily available prior to contact.	ETF Help Desk: Toll free: (866) 843-9724 Local: (608) 264-9181
You have misplaced the letters received from the ETF that contain your Password and Password Identifier, Logon ID, and Logon Identifier and you cannot remember your Logon ID or Password.	ETF will reissue your letter.	ETF Help Desk: Toll free: (866) 843-9724 Local: (608) 264-9181
Your employee with ONE access left their position.	Immediately send either e-mail or a fax including the name of the employer, the EIN, the name of the employee, their LogonID, and the effective date.	ETF's Employer Communication Center Toll free: (888) 681-3952 Local: (608) 264-7900
A new employee is hired who will need ONE access.	Complete an <i>Online Network for Employers Security Agreement</i> (ET-8928) and submit it to ETF.	1. Download from ETF's homepage (or) 2. Copy agreement from this manual (or) 3. Contact ETF's Employer Communication Center at (608) 264-7900

### **302 Insurance Eligibility**

If your newly hired employee is WRS eligible, the employee is also eligible to participate in all ETF administered insurance programs in which you participate. While each insurance program has varying eligibility criteria, most programs require that the employee serve a six-month qualifying period. The insurance eligibility criteria differ depending upon status as a State or Local employee. The Employer Administration Manual specific to each program provides details on the required qualifying period or deferred enrollment requirements.

Detailed information regarding Employer Identification Numbers (EINs); enrollment dates; termination dates; and employment categories for both State and Local employers displays in the Previous Service portion of the screen. A message alerts you to the State and/or Local WRS service the employee has.

Do not apply creditable service when determining that the six-month qualifying period has been met for insurance eligibility determinations.

**Example:** If previous service information indicates an employee began WRS participation 3/1/96 and terminated 3/1/05, you may assume the employee performed 9.00 years of creditable service, however, if the employee worked only half-time the total creditable service may be 4.50 years. In this case the employee has satisfied the six month qualifying period.

### **303 Previous Service Information**

Capturing the history of WRS participation is complex and, in some situations, the information that is provided to employers on the WRS Previous Service & Benefit Inquiry screen may not appear complete. Detailed employment information is displayed if WRS service occurred after 1985. Detailed WRS information prior to 1985 was not captured in a manner sufficient to display details. Staff from ETF's Employer Communication Center can provide assistance in those few exceptions where information appears incomplete.

The type of employment is not captured for WRS purposes and the creditable service may represent full-time, part-time, seasonal, limited term or other employment types. The previous service information is listed in terms of employment dates and may not appear to relate to the amount of creditable service for that period of employment.

When an employment category change is processed, the date the participant ceases employment in the present employment category will appear as a termination date.

Dates in the previous service portion of the application will display, even after the employee receives a WRS benefit. The calculation message for Previous Service will indicate the employee has previous service, even after the employee receives a benefit. Employers must review the Retirement Annuity Information and the Lump Sum (Separation or Retirement) Benefit Information, in addition to the Previous Service information and apply all data to make a correct determination of previous service.

**Example:** Employee participated in WRS from 3/1/96-3/1/05 and received a benefit 3/15/05. Those dates continue to display and the calculation message will indicate the employee served six months. However, the Lump Sum (Separation or Retirement) Benefit Information will display the 3/15/05 benefit date. In this example, the employee must serve another six months to be eligible to participate in the insurance programs.

There may be complex situations displayed on the Previous Service & Benefit Inquiry screen. If you have difficulties interpreting the information, or have other questions, please contact the Employer Communication Center toll free at (888) 681-3952 or locally at (608) 264-7900 for assistance.

### 304 Instructions on Determining WRS Previous Service

To determine the previous service status and/or benefit inquiry of an employee, key the employee's nine-digit SSN without hyphens or spaces (eg. 999999999) and click **INQUIRE**. The following information displays:

- Member's SSN.
- Member's Last name, First name and Middle Initial.
- Member's Birthdate.
- Previous Service, Retirement Annuity Information, Lump Sum (Separation or Retirement) Benefit Information, and Creditable Service.

The message "No SSN on file – Verify SSN XXX-XX-XXXX" will display if an employee was never enrolled in WRS, if the SSN was miskeyed, or if the employee is covered for WRS but the ETF system is not operational.

### 305 Explanation of Terms

The following fields appear on the screen and details regarding the information displayed are explained in the links on the screen:

- **State or Local Employer Identification Number(s):**

The Employer Identification Number(s) display. State employer EINs are seven-digit numbers beginning with 0001. Example: 0001-110. Local employer EINs are seven-digit numbers ending with 000. Example: 4391-000. Employer names associated with the EIN(s) are not displayed.

- **Employment Category:**

The employee's Employment Category is determined by the employer's designated WRS Agent when the employee's WRS participation begins. The category establishes the WRS contribution rates required and the annuity benefit available under the WRS.

Following is a list of the potential two-digit Employment Category Codes and their corresponding descriptions:

- 00 General (State agencies who report via Central Payroll report general category as 09)
- 01 Court Reporter (Used by State agencies)
- 02 State executive retirement plan (Used by State agencies)
- 03 Protective Occupation under Social Security
- 04 Protective Occupation NOT Under Social Security
- 05 Supreme Court Justice
- 06 Legislative, District Attorney or State Constitutional Officer
- 07 Appellate Judge
- 08 Circuit Court Judge
- 09 Local Elected Official or Person Appointed to fill an Elected Position
- 10 Teacher
- 11 State Teacher Executive Plan (Used only by State agencies)
- 12 Educational Support Personnel

➤ **Enrollment Date/Begin Date Change:**

The Enrollment Date is the date the employee began WRS participation with an employer. All Enrollment Dates for an employer are displayed, with the exception of the Begin Date within a new category for the same employer if a Category Change was reported on an *Employee Transaction Report, ET-2533*, using action code P010. If there are multiple employers, enrollment information is listed for each EIN. If the Enrollment Begin Date changed, the revised WRS Begin Date is also displayed.

➤ **Termination Date:**

The termination date is the date a participating employee terminated WRS coverage with a WRS employer. Different types of terminations include a resignation for retirement or other purposes; termination due to a non-work related illness or injury; dismissal or discharge; employee's death; termination due to work related illness or injury; termination of local elected official waiving part-time elected service; and termination as a result of a change in employment category.

Contact the Employer Communication Center if there appears to be a discrepancy between the amount of creditable service indicated and the dates of employment.

### **306 Message**

Detailed information will display for either State or Local employers requesting the information; however, the displayed message will vary depending upon employer type, i.e., State or Local. The calculation of the six months and message displayed is not based on creditable service, but rather the dates of WRS participating employment.

The following tables describe the conditions and messages related to previous service.

<b>STATE EMPLOYER</b>	
“Six months state service”	State service is greater than or equal to six months.
“Less than six months state service; local service exists”	State service is less than six months, but greater than zero for local employers.
“No state or local service”	Service is equal to zero for both state and local employers. Employee may have been enrolled in WRS and information will not display until the annual report is submitted.
“No state service; local service exists”	Service is equal to zero for state employer and greater than zero for local employer.
<b>LOCAL EMPLOYER</b>	
“Six months WRS service”	Service is greater than or equal to six months for any employer(s).
“Less than six months local service”	Local service is less than six months, but greater than zero for a local employer.
“No applicable service”	Service is equal to zero for any employer(s). Employee may have been enrolled in WRS and information will not display until the annual report is submitted.

<b>MESSAGES FOR BOTH STATE AND LOCAL EMPLOYERS</b>		
“No SSN on file- Verify SSN XXX-XX-XXXX”	No Social Security Number matches the SSN you entered	Employee does not have previous WRS service or the SSN was entered incorrectly
“Benefit Application, call ETF”	A Retirement or Separation Benefit Application has been received at ETF and is pending, or a Disability Application has been approved.	Call Employer Communication Center: toll free at (888) 681-3952 or locally at (608) 264-7900 for further instructions
“Death Date on file, call ETF at (608) 264-7900”	A death has been reported for an active employee	Call Employer Communication Center: toll free at (888) 681-3952 or locally at (608) 264-7900 for further instructions

### 307 Sample Previous Service Screen

Previous Service/Benefit Inquiry

<https://prd2.state.wi.us/servlet/etfinquiry>

#### WRS Retirement System (WRS)

#### Previous Service and Benefit Inquiry

Employee Social Security:	(999999999)
Name:	
Birthdate:	

#### **Previous Service** (Dates prior to 1985 do not display)

State	Category	Enrollment <u>Date/Begin</u> <u>Date</u> <u>Change</u>	Termination Date	Local	Category	Enrollment <u>Date/Begin</u> <u>Date</u> <u>Change</u>	Termination Date
-------	----------	---	---------------------	-------	----------	---	---------------------

Message: No SSN Entered

---

#### Retirement Annuity Information

Annuity Benefit Application Received Date:

Annuity Benefit Effective Date:

#### Lump Sum (Separation or Retirement) Benefit Information

Lump Sum Benefit Application Received Date:

Lump Sum Benefit Effective Date:

---

#### Creditable Service

Category Creditable

Service

For more information, contact: Employer Communications Center toll free at (888)861-3952 or locally at (608) 264-7900.