



STATE OF WISCONSIN
Department of Employee Trust Funds
A. John Voelker
 SECRETARY

Wisconsin Department
 of Employee Trust Funds
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This checklist should be used by any employer who has submitted a Resolution for Inclusion Under the Wisconsin Retirement System (ET-1319). It provides steps all new employers must take to administer WRS benefits.

The employer is responsible for completing all items on the checklist by the dates provided below. If you have any questions, contact ETF at ETFSMBEmployerWRS@etf.wi.gov or 877-533-5020, Option 2 for Employer Services.

Employer Information	
Employer Name:	Employer ETF Identification Number (EIN):
Assigned WRS Case Manager:	

Items to Complete by December 1

- Review the [How to Join the Wisconsin Retirement System \(ET-1129\)](#) brochure.
- Watch the [WRS New Employer: What to Expect](#) recorded webinar.
- Complete required training listed below. Most topics include one or more recorded webinars and chapter(s) in the [WRS Administration Manual](#).

WRS Eligibility & WRS Rehired Annuitants

- [View WRS Eligibility](#) recorded webinar (33 min.)
- [View WRS Employment of Annuitant](#) recorded webinar (25 min.)
- Review [WRS Administration Manual](#) Chapter 3: *WRS Eligibility Determination* and Chapter 15: *Employment of Annuitants*
- Follow the instructions on page 3 of this checklist to list **all employees** who receive pay for services. This includes WRS eligible *and* ineligible employees.
- Distribute a [Rehired Annuitant Form \(ET-2319\)](#) to any employee who is also receiving a WRS Annuity no later than **December 1**. Forms should be returned to the employer by **December 15**.

Items to Complete by December 15

- Complete required training listed below. Most topics include one or more recorded webinars and chapter(s) in the [WRS Administration Manual](#).

WRS Employment Category Determination

- [View WRS Employment Category Determination](#) recorded webinar (13 min.)
- Review [WRS Administration Manual](#) Chapter 4: *Employment Category Determination*

WRS Earnings and Reportable Hours

- [View WRS Reportable Earnings and Hours](#) recorded webinar (20 min.)
- Review [WRS Administration Manual](#) Chapter 5: *Earnings and Reportable Hours*. Subchapter 508 provides a chart for most types of earnings to help determine whether reportable or non-reportable.



Items to Complete by December 30

- Complete required training listed below. Most topics include one or more recorded webinars and chapter(s) in the [WRS Administration Manual](#).

WRS Transaction Reporting

- Review [WRS Administration Manual](#) Chapter 6: *Employee's Individual Account*, Chapter 9: *Periodic Transaction Reporting*, Chapter 10: *Annual Reporting and Reconciliation*, Chapter 11: *Prior Year Adjustments*, and Chapter 14: *Termination Rule and Reporting*.

WRS Monthly Retirement Remittance Reporting

- [View](#) *WRS Monthly Retirement Remittance Reporting* recorded webinar (19 min.)
- Review [WRS Administration Manual](#) Chapter 8: *Monthly Retirement Remittance Report*
- Distribute the forms below to all WRS-eligible employees. Do not distribute to employees who are not eligible. You may print linked materials from our website or provide links by email to the employee. Hard copies can be ordered [here](#) but can take up to 3 weeks to be delivered.
 - [Election to Participate in the Variable Trust Fund \(ET-2356\)](#)
 - [Additional Contributions \(ET-2123\)](#)
 - [Beneficiary Designation \(ET-2320\)](#)
 - [Your Benefit Handbook \(ET-2119\)](#)

Please hold these forms until the January 1 effective date has passed and your employees have been enrolled.

Items Due by January 15

- Use the WRS Account Update application on the [ETF Web Applications for Employers](#) page to enroll all eligible employees. **Enrollments may not be entered before January 1 but should be completed by January 15.**

Items Due by January 31

- Return completed forms in **one batch**. Forms may be faxed to 608-266-5801 Attn: WRS Unit or *securely* emailed to ETFSMBEmployerWRS@etf.wi.gov. ETF does not need the original forms if faxed or emailed. Please keep them for your records.
 - New Employer Onboarding Checklist* (ET-1419)—this form.
 - [Rehired Annuitant Form \(ET-2319\)](#), if applicable.

If fax or email is not available, mail forms in **one batch** to:

Wisconsin Department of Employee Trust Funds
ATTN: Employer Services
PO Box 7931
Madison WI 53707-7931

- Return completed employee forms to ETF's main fax line at 608-267-4549
 - [Election to Participate in the Variable Trust Fund \(ET-2356\)](#)
 - [Beneficiary Designation \(ET-2320\)](#)

