New Employer Agent/Contact Wisconsin Retirement System Training Checklist

Wisconsin Department
of Employee Trust Funds
PO Box 7931
Madison WI 53707-7931
1-877-533-5020 (toll free)
Fax 608-267-4549
etf.wi.gov

Complete this checklist if you are a new employer agent or your employer's new retirement contact with the Department of Employee Trust Funds. Contact ETF with any questions. Employer resources can be found online at etf.wi.gov/employers.htm.

Employer Information		
Employer Agent/Contact Name		Employer ETF ID
ETF Case Manager Information		
WRS Case Manager Name	WRS Case Manager Email Address	2-Digit Extension
Insurance Case Manager Name	Insurance Case Manager Email Address	2-Digit Extension

WRS Eligibility & WRS Rehired Annuitants

- ☐ View *WRS Eligibility* recorded webinar
- ☐ View *WRS Rehired Annuitants* recorded webinar
- ☐ Review related resources:
  - Web Application: *Previous Service & Benefit Inquiry* allows employers to view employees' WRS participation history and benefit information to determine eligibility and rehired annuitant status.
  - WRS Administration Manual Chapter 3: *WRS Eligibility Determination*, Chapter 14: *Termination Rule & Reporting*, and Chapter 15: *Employment of Annuitants*
  - New Employee Benefit Checklist (ET-2572) is used to assist with determining eligibility for new employees, along with tracking due dates and ensuring appropriate information and forms are supplied for all ETF-administered benefits offered by the employer.

WRS Employment Category Determination

- ☐ View *WRS Employment Category Determination* recorded webinar
- ☐ Review related resources:
  - Web Applications: *WRS Earnings Reports (On-going)* for current year and *WRS Earnings Reports (Final)* for the previous 5 years are used to view the *Active Employee Listing* in the On-going reports and the *Employee Transaction Detail* in the Final reports for employee roster information to ensure employees with the same job are enrolled in the same employment category.
  - WRS Administration Manual Chapter 4: *Employment Category Determination*

WRS Transaction Reporting

- ☐ View Transaction Related recorded webinars
- ☐ Review related resources:
  - Web Applications: *WRS Account Update* and *WRS Transaction Upload* are used to securely send employee account information to ETF such as enrollments, descriptive data changes, periodic employee transactions, annual transactions and prior year correction transactions.
  - 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 Earnings and Reportable Hours

- ☐ View WRS Earnings and Reportable Hours recorded webinar
- ☐ Review related resources:
  - Web Applications: *WRS Earnings Reports (On-going)* for current year, and *WRS Earnings Reports (Final)* for the previous five years. For WRS Earnings and Reportable Hours purposes, you can view the Employee Transaction Detail report in both the on-going and final reports to compare against your payroll system to identify what was reported in the current year and what has been reported for prior years.
  - 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.

WRS Monthly Retirement Remittance Reporting

- ☐ View WRS Monthly Retirement Remittance Reporting recorded webinar
- ☐ Review related resources:
  - Web Application - *WRS Contribution Remittance Entry* is used to transmit the required WRS Monthly Retirement Remittance Reports to ETF and make payment through the banking ACH process.
  - WRS Administration Manual Chapter 8: *Monthly Retirement Remittance Report*
  - Automated Clearing House ACH Direct Withdrawal Authorization (ET-1734) is used to change or update an employer's bank information for direct withdrawal.

Other Information

Forms/Brochures

- All forms and brochures are on our website and content can be filtered by publication number, keywords (i.e. *new employee* or *rehired annuitant*), audience, and/or benefit program.
- Forms can be printed directly from our website and links can be provided to members (your employees) for them to save/print. Paper copies may be requested through the Employer Forms Order page.

ETF-Administered Insurance Benefits

- ETF administers health, life, and income continuation insurance (ICI) programs that your agency may or may not participate in.
- The Employer Insurance Programs page on ETF's website provides details regarding each program and includes the link to *myETF Benefits Administrator* web application used by employers to complete ETF-administered health and ICI benefits related transactions and invoice payment.