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TSA/MEA

# Data Element Dictionary

UWSA Office of Staff Benefits



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# TSA/MEA Entity Descriptions

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## Employee Information

Employee Information describes personal and financial details about UW employees with contributions to TSA (Tax Shelter Annuity) accounts in order to provide the requested information to TIAA/CREF, the company that calculates each employee's MEA (maximum exclusion allowance). Data in the Employee Information entity is maintained for 7 years. Only the current 'tax year' is modifiable.

**Base Table Name:** UWSTSA.TSA\_EMPL\_INFO

\*KEY= SSN + Tax year.

**Special Considerations:**

A *unique* record may be selected from this table by specifying a specific value for the SSN and Tax year.

**Authorization:**

You must receive approval to access data from the data custodian. For information on which forms to fill out or what connections are necessary see:

**Data Custodian:**

UW System Administration

Director of Staff Benefits & Payroll Policy

**Data Elements:**

Address line

Birth date

City

Country

Date of Employment

Expected Annual WRS Service

Expected Annual Non-WRS Service

Expected Gross Annual Salary

Expected Section 125 Contribution

Expected Section 403(b) Contribution (a.k.a. TSA Amount)

Expected Section 457 Contribution (a.k.a. Deferred Compensation)  
Footnote  
Institution (a.k.a. Unit)  
MEA Alternative 1 Election  
MEA Alternative 2 Election  
MEA Alternative Election Indicator  
MEA Current Election Indicator  
MEA General Limit  
MEA Update Date  
MEA Update User  
Name, First  
Name, Full  
Name, Last  
Name, Middle initial  
Retirement Category  
Social Security Number  
State  
Sum of Excess Deferrals (a.k.a. Sum Section 402(g) priors; a.k.a. Accumulated Catchup)  
Sum of Non-WRS Service  
Sum Section 403(b) Contributions  
Sum Section 457 Contributions  
Sum WRS Employee Contributions (a.k.a. Investment in Contract)  
Sum WRS Service  
Tax Year  
Update Date  
Update ID  
Years of Service  
Zip Code

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# Institution Coordinator

Institution Coordinator contains name and address information about TSA Coordinators at each institution.

**Base Table Name:** UWSTSA.TSA\_INST\_COORD

\*KEY= Institution + Coordinator name.

**Special Considerations:**

A *unique* record may be selected from this table by specifying a specific value for the Institution and Coordinator name.

**Authorization:**

You must receive approval to access data from the data custodian. For information on which forms to fill out or what connections are necessary see:

**Data Custodian:**

UW System Administration

Director of Staff Benefits & Payroll Policy

**Data Elements:**

Address line

City

Coordinator email

Coordinator fax

Coordinator Name

Coordinator Phone

Coordinator User ID

Campus Abbreviation

Campus Name

State

Update Date

Zip Code

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# Retirement Category

Translate the employee's WRS employment category to a retirement plan.

**Base Table Name:** UWSTSA.TSA\_RET\_CAT

\*KEY= Retirement Category.

**Special Considerations:**

A *unique* record may be selected from this table by specifying a specific value for the Retirement Category.

**Authorization:**

You must receive approval to access data from the data custodian. For information on which forms to fill out or what connections are necessary see:

**Data Custodian:**

UW System Administration

Director of Staff Benefits & Payroll Policy

**Data Elements:**

Effective Tax Year

Normal Retirement Age

Retirement Category

Retirement Category Description

Retirement Plan

WRS Formula Factor

Update Date

---

## Retirement Plan

Describes the WRS Retirement Plan, used to calculate MEA.

**Base Table Name:** UWSTSA.TSA\_RET\_CAT

\*KEY= Retirement Plan.

**Special Considerations:**

A *unique* record may be selected from this table by specifying a specific value for the Retirement Plan.

**Authorization:**

You must receive approval to access data from the data custodian. For information on which forms to fill out or what connections are necessary see:

**Data Custodian:**

UW System Administration

Director of Staff Benefits & Payroll Policy

**Data Elements:**

Retirement Plan

Retirement Plan Description

---

# Vendor

Describes the TSA Vendors to whom employees send contributions

**Base Table Name:** UWSTSA.TSA\_RET\_CAT

\*KEY= Vendor.

**Special Considerations:**

A *unique* record may be selected from this table by specifying a specific value for the Vendor.

**Authorization:**

You must receive approval to access data from the data custodian. For information on which forms to fill out or what connections are necessary see:

**Data Custodian:**

UW System Administration

Director of Staff Benefits & Payroll Policy

**Data Elements:**

Vendor Code

Vendor Description

Update Date

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## Employee Vendor

Describes each employee's contribution amount to each specific TSA Vendor.

**Base Table Name:** UWSTSA.TSA\_RET\_CAT

\*KEY= SSN + Vendor + Tax year.

**Special Considerations:**

A *unique* record may be selected from this table by specifying a specific value for the SSN, Vendor, and Tax year.

**Authorization:**

You must receive approval to access data from the data custodian. For information on which forms to fill out or what connections are necessary see:

**Data Custodian:**

UW System Administration

Director of Staff Benefits & Payroll Policy

**Data Elements:**

SSN

Tax Year

Vendor Code

Vendor Contribution

Update Date

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## IRS Table 1

IRS\_TABLE\_1 - A table by normal retirement age of the value at normal retirement age of an annuity of \$1.00 per annum payable in equal monthly installments during the life of the employee, based upon normal retirement age as defined in the plan. This table is included in IRS regulations and is based on federally established mortality tables. Source: U.S. Treasury Regulations 1.403(b)-(1)(d)(4).

**Base Table Name:** UWSTSA.IRS\_TABLE\_1

\*KEY=Normal Retirement Age

**Special Considerations:**

A *unique* code can be selected from this table by specifying a specific value for the Normal Retirement Age.

**Data Custodian:**

UW System Administration

Director of Staff Benefits & Payroll Policy

**Data Elements:**

Normal Retirement Age

IRS Table Value

Effective Tax Year

---

## IRS Table 2

IRS\_TABLE\_2 - A table by years of service expected to be rendered by the employee prior to normal retirement age, and representing the level annual contribution that will accumulate to \$1.00 at normal retirement age. This table is included in IRS regulations and assumes 8% annual interest. Source: U.S. Treasury Regulations 1.403(b)-(1)(d)(4).

**Base Table Name:** UWSTSA.IRS\_TABLE\_2

\*KEY=Estimated Years of Service

**Special Considerations:**

A *unique* code can be selected from this table by specifying a specific value for the Estimated Years of Service.

**Data Custodian:**

UW System Administration

Director of Staff Benefits & Payroll Policy

**Data Elements:**

Estimated Service Years

IRS Table 2 Value

Effective Tax Year

# TSA/MEA Data Elements

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# Address line

**Definition:**

The street, route, apartment number, suite number, and/or PO box portion of the address.

When associated with the employee it is the home address.

When associated with the Institution Coordinator, it is the work address.

**Length/Format:**

60 / Character: Address line 1 (30)

Address line 2 (30)

**Coding:****Validation:**

The address may be unknown or blank.

If the employee address is unknown, then the address of the TSA 'institution coordinator' should be used when needed.

**Business Rule:**

Employee reported.

For TIAA/CREF, the full name and the address lines, EXACTLY as provided in the data file, will be used as the mailing address (see 6/13/96 letter from TIAA/CREF).

**Custodian:**

Director of Staff Benefits & Payroll Policy

**Physical Location:**

UWSTSA.TSA\_EMPL\_INFO.ADDR\_1

UWSTSA.TSA\_EMPL\_INFO.ADDR\_2

UWSTSA.TSA\_INST\_COORD.ADDR1

UWSTSA.TSA\_INST\_COORD.ADDR2

UWSTSA.TSA\_TIAA.ADDR\_1

UWSTSA.TSA\_TIAA.ADDR\_2

**Source:**

Initially extracted from 'ETF' data, (for all institutions). Dataset is sent via ftp by UWPC. Annually updated from the annual tape that is sent to DETF by WARF and UWPC.

NOTE: There may be records on the DETF Annual Detail Report tape that will not match to records on the annual extract of W2 TSA records due to the fact that records are reported to DETF throughout the year for those individuals terminating, retiring, etc.

In 1996 there will be detail data on both files for employees of Oshkosh, Superior and Eau Claire.

In 1997 there will be detail data on both files for employees of Whitewater, LaCrosse, Platteville, Stevens Point, Stout, and River Falls.

Dataset is sent via ftp by UWPC.

**Date issued/revised:**

12/28/05

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# Birth Date

**Definition:**

The year, month and day of an employee's birth.

**Length/Format:**

Date / YYYYMMDD

May also appear as numeric or other date formats (such as YYYYMMDD) on reports or screens.

**Coding:****Validation:**

Required, may not be null.

**Business Rule:**

Employee reported.

**Custodian:**

Director of Staff Benefits & Payroll Policy

**Physical Location:**

UWSTSA.TSA\_EMPL\_INFO.BIRTHDATE

UWSTSA.TSA\_TIAA.BIRTHDATE

**Source:**

Initially extracted from 'ETF' data, (for all institutions). Dataset is sent via ftp by UWPC. Annually updated from the annual tape that is sent to DETF by WARF and UWPC.

NOTE: There may be records on the DETF Annual Detail Report tape that will not match to records on the annual extract of W2 TSA records due to the fact that records are reported to DETF throughout the year for those individuals terminating, retiring, etc.

In 1996 there will be detail data on both files for employees of Oshkosh, Superior and Eau Claire.

In 1997 there will be detail data on both files for employees of Whitewater, LaCrosse, Platteville, Stevens Point, Stout, and River Falls.

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## Campus Abbreviation (a.k.a. Unit)

**Definition:**

The code indicates the Institution where the employee has TSA. A Unit is generally an institution within the University System. Most institutions have academic program offerings; a few are for administrative or financial purposes. A letter of the alphabet represents units.

**Length/Format:**

1 / Character

**Coding:**

CODE	NAME
A	UW Madison
B	UW Milwaukee
C	UW Eau Claire
D	UW Green Bay
E	UW La Crosse
F	UW Oshkosh
G	UW Parkside
H	UW Platteville
J	UW River Falls
K	UW Stevens Point
L	UW Stout
M	UW Superior
N	UW Whitewater
R	UW Centers
T	UW Extension
W	UW System Administration
Y	System Wide

**Validation:**

Must be a valid UW System Institution.  
Required, may not be null.

**Business Rule:**

Organization UDDS code found in the current Budget (Red Book) Vol. 1.  
SSN + Institution + Tax Year uniquely identifies an individual employee with TSA contributions.

**Custodian:**

Director of Staff Benefits & Payroll Policy

**Physical Location:**

UWSTSA.TSA\_EMPL\_INFO.UNIT  
UWSTSA.TSA\_INSTITUTION\_COORD.UNIT  
UWSTSA.TSA\_TIAA.UNIT

**Source:**

Initially extracted from 'ETF' data, (for all institutions). Dataset is sent via ftp by UWPC. Annually updated from the annual tape that is sent to DETF by WARF and UWPC.

NOTE: There may be records on the DETF Annual Detail Report tape that will not match to records on the annual extract of W2 TSA records due to the fact that records are reported to DETF throughout the year for those individuals terminating, retiring, etc.

In 1996 there will be detail data on both files for employees of Oshkosh, Superior and Eau Claire.

In 1997 there will be detail data on both files for employees of Whitewater, LaCrosse, Platteville, Stevens Point, Stout, and River Falls.

**Date issued/revised:**

12/28/05

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# Campus Name

**Definition:**

The name of the Institution (a.k.a. unit) where the employee has TSA. A Unit is generally an institution within the University System. Most institutions have academic program offerings; a few are for administrative or financial purposes. A letter of the alphabet represents units.

**Length/Format:**

30 / Character

**Coding:**

CODE	TRANSLATION
A	UW Madison
B	UW Milwaukee
C	UW Eau Claire
D	UW Green Bay
E	UW La Crosse
F	UW Oshkosh
G	UW Parkside
H	UW Platteville
J	UW River Falls
K	UW Stevens Point
L	UW Stout
M	UW Superior
N	UW Whitewater
R	UW Centers
T	UW Extension
W	UW System Administration
Y	System Wide

**Validation:**

Must be a valid UW System Institution.

**Business Rule:**

Organization UDDS code found in the current Budget (Red Book) Vol. 1.

**Custodian:**

Director of Staff Benefits & Payroll Policy

**Physical Location:**

UWSTSA.TSA\_INST\_COORD.CAMPUS\_NAME

**Source:**

Derived from table of Institution Codes.

**Date issued/revised:**

12/28/05

**Date issued/revised:**

12/28/05

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# City

**Definition:**

The city portion of the address.

When associated with the employee it is the home address.

When associated with the Institution Coordinator, it is the work address.

**Length/Format:**

19 / Character

**Coding:**

When creating the TIAA/CREF dataset, concatenate City, State, Zip into one address line.

**Validation:**

The address may be unknown or blank.

If the employee address is unknown, then the address of the TSA 'Institution coordinator' should be used when needed.

**Business Rule:**

Employee reported.

For TIAA/CREF, the full name and the address lines, EXACTLY as provided in the data file, will be used as the mailing address (see 6/13/96 letter from TIAA/CREF).

**Custodian:**

Director of Staff Benefits & Payroll Policy

**Physical Location:**

UWSTSA.TSA\_EMPL\_INFO.CITY

UWSTSA.TSA\_INST\_COORD.CITY

UWSTSA.TSA\_TIAA.ADDR\_3

UWSTSA.TSA\_TIAA.ADDR\_4

**Source:**

Initially extracted from 'ETF' data, (for all institutions). Dataset is sent via ftp by UWPC. Annually updated from the annual tape that is sent to DETF by WARF and UWPC.

NOTE: There may be records on the DETF Annual Detail Report tape that will not match to records on the annual extract of W2 TSA records due to the fact that records are reported to DETF throughout the year for those individuals terminating, retiring, etc.

In 1996 there will be detail data on both files for employees of Oshkosh, Superior and Eau Claire.

In 1997 there will be detail data on both files for employees of Whitewater, LaCrosse, Platteville, Stevens Point, Stout, and River Falls.

**Date issued/revised:**

12/28/05

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# Coordinator E-mail

**Definition:**

The TSA Institution Coordinator's e-mail address.

**Length/Format:**

40 / Character

**Coding:****Validation:****Business Rule:****Custodian:**

Director of Staff Benefits & Payroll Policy

**Physical Location:**

UWSTSA.TSA\_INST\_COORD.COORD\_EMAIL

**Source:**

Data entry.

**Date issued/revised:**

12/28/05

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# Coordinator Fax

**Definition:**

The facsimile machine phone number of the TSA Institution Coordinator.

**Length/Format:**

10 / Character

**Coding:**

Area code + 7 digit phone number

**Validation:****Business Rule:****Custodian:**

Director of Staff Benefits & Payroll Policy

**Physical Location:**

UWSTSA.TSA\_INST\_COORD.COORD\_FAX

**Source:**

Data entry.

**Date issued/revised:**

12/28/05

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# Coordinator Name

**Definition:**

The full name of the TSA Institution Coordinator.

**Length/Format:**

30 / Character    Lastname, Firstname Middleinitial

**Coding:****Validation:****Business Rule:****Custodian:**

Director of Staff Benefits & Payroll Policy

**Physical Location:**

Derived for employee.

UWSTSA.TSA\_INST\_COORD.COORD\_NAME

**Source:**

Data entry.

**Date issued/revised:**

12/28/05

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# Coordinator Phone

**Definition:**

The phone number belonging to the TSA Institution Coordinator.

**Length/Format:**

10 / Character

**Coding:**

Area code + 7 digit phone number

**Validation:****Business Rule:****Custodian:**

Director of Staff Benefits & Payroll Policy

**Physical Location:**

UWSTSA.TSA\_INST\_COORD.COORD\_PHONE

**Source:**

Data entry.

**Date issued/revised:**

12/28/05

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# Coordinator User ID

**Definition:**

The application login user ID of the TSA Institution Coordinator.

**Length/Format:**

10 / Character

**Coding:****Validation:****Business Rule:****Custodian:**

Director of Staff Benefits & Payroll Policy

**Physical Location:**

UWSTSA.TSA\_INST\_COORD.COORD\_USERID

**Source:**

Data entry.

**Date issued/revised:**

12/28/05

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# Country

**Definition:**

Country portion of the address associated with the employee's home address.

**Length/Format:**

30 / Character

**Coding:****Validation:**

If the employee is from the US, then this field can be blank. If the employee's home address is in a foreign country, this field should be filled in.

The address may be unknown or blank.

If the employee address is unknown, then the address of the TSA 'Institution coordinator' should be used when needed.

**Business Rule:**

Employee reported.

For TIAA/CREF, the full name and the address lines, EXACTLY as provided in the data file, will be used as the mailing address (see 6/13/96 letter from TIAA/CREF)

**Custodian:**

Director of Staff Benefits & Payroll Policy

**Physical Location:**

UWSTSA.TSA\_EMPL\_INFO.COUNTRY

UWSTSA.TSA\_TIAA.ADDR\_4

**Source:**

Initially extracted from 'ETF' data, (for all institutions). Dataset is sent via ftp by UWPC. Annually updated from the annual tape that is sent to DETF by WARF and UWPC.

NOTE: There may be records on the DETF Annual Detail Report tape that will not match to records on the annual extract of W2 TSA records due to the fact that records are reported to DETF throughout the year for those individuals terminating, retiring, etc.

In 1996 there will be detail data on both files for employees of Oshkosh, Superior and Eau Claire.

In 1997 there will be detail data on both files for employees of Whitewater, LaCrosse, Platteville, Stevens Point, Stout, and River Falls.

**Date issued/revised:**

12/28/05

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# Date of Employment

**Definition:**

Date the employee started working at the University of Wisconsin on a full time basis, adjusted for breaks in service.

**Length/Format:**

Numeric or Date / MMDDYY

May also appear as numeric or other date formats (such as YYYYMMDD) on reports or screens.

**Coding:**

This date may be dynamically calculated as follows:

Date of Employment = Tax\_year - (Years\_of\_service \* 365 days).

Note1: The UWSA Oracle database interprets number constants in arithmetic date expressions as numbers of days, hence Years\_of\_Service must be converted to days in order for the Date of Employment calculation to process accurately.

Note2: The ETF data is received for the prior year service and so the total years of creditable service initially loaded must be adjusted by a year (+1) to make up for the time lapse. No adjustment need be made during the annual update.

**Validation:**

Derived for screens, reports, export, and queries.

**Business Rule:****Custodian:**

Director of Staff Benefits & Payroll Policy

**Physical Location:**

UWSTSA.TSA\_TIAA.DATE\_OF\_EMPLOYMENT

**Source:**

Derived.

**Date issued/revised:**

11/5/96

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# Expected Annual WRS Service

**Definition:**

The employee's creditable service earned under the Wisconsin Retirement System from University of Wisconsin employment expected during the current tax year.

**Length/Format:**

3/ Number 9.99

**Coding:**

When the new tax year is created, this field defaults to 1.00 unless Retirement Plan = None. If Retirement Plan = none, this field defaults to 0.00.

During the current tax year, the Expected Annual WRS Service field has a default value or is updated by the coordinator. At the end of the tax year, the correct value of Expected Annual WRS Service is computed as follows:

For retirement (employment) category 00, 03, and 11, divide the calendar year hours reported on the UWPC file sent to ETF by 1904 (not to exceed 1.00).

For retirement (employment) category 10 divide the calendar year hours by 1320 (not to exceed 1.00).

When the subsequent new tax year is created, this result is also used to update the Sum of Prior WRS Service:  $\text{Sum of Prior WRS Service} = \text{Sum of Prior WRS Service} + \text{Expected Annual WRS Service}$

**Validation:**

Required; may not be null. Defaults to 1.00 or 0.00.

**Business Rule:**

For purposes of MEA calculation, the Expected Annual WRS Service reflects the fraction of 1.00 year of creditable service that the employee is expected to earn under the WRS during the current calendar year while employed at the University of Wisconsin.

NOTE: Because ETF computes creditable service for teachers and executive teachers (categories 10 and 11) on a fiscal year basis, the calendar-year computation will not always exactly match the WRS service credited by ETF for these categories.

**Custodian:** Director of Staff Benefits and Payroll Policy

**Physical Location:**

UWSTSA.TSA\_EMPL\_INFO.EXP\_ANNUAL\_WRS\_SERVICE

**Source:**

Annually calculated from the annual tape that is sent to DETF (File Name: MEA.CALC 1 for UWPC and MEA.CALC.2 for WARF). Data element name "fiscal year hours or calendar year hours". Calculated by dividing calendar year hours for retirement categories 00, 03 and 11 by 1904, and dividing calendar year hours for retirement category 10 by 1320. NOTE: employees who terminate employment before late in the year are reported on a monthly basis to ETF, and do not appear on the annual tape. These individuals are likely to be interpreted as having "No WRS Coverage."

For 1997, hours credited prior to payroll merger for employees of Whitewater, LaCrosse, Platteville, Stevens Point, Stout, and River Falls were extracted from unadjusted files maintained by WARF payroll.

**Date issued/revised:**

7/21/98

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## Expected Annual Non-WRS Service

**Definition:**

The employee's service at the University of Wisconsin in position(s) not covered by the Wisconsin Retirement System during the current tax year, based on full-time equivalency

**Length/Format:**

3 /number 9.99

**Coding:**

When the new tax year is created, this field defaults to 0.00 unless Retirement Plan = None. If Retirement Plan = none, this field defaults to 1.00.

Currently there is no automated source for this information. During the current tax year, the Expected Annual non-WRS Service field has a default value or is updated by the coordinator. At the end of the tax year, the campus TSA coordinator must determine the correct value of Expected Annual non-WRS Service. At the present time, it is not expected that values will be entered unless the employee participates in the TSA Program.

When the subsequent new tax year is created, the value in this field is also used to update the Sum of non-WRS Service:  
Sum of non-WRS Service = Sum of non-WRS Service + Expected Annual non-WRS Service

**Validation:**

Required, may not be null.

**Business Rule:**

For purposes of MEA calculation, the Expected Annual non-WRS Service reflects the fraction of 1.00 year that the employee is expected to work during the current calendar year while employed at the University of Wisconsin in position(s) not covered by the Wisconsin Retirement System.

**Custodian:**

Assistant Director of Staff Benefits & Payroll Policy

**Physical Location:**

UWSTSA.TSA\_EMPL\_INFO.EXP\_ANNUAL\_NON\_WRS\_SERVICE

**Source:**

Not yet determined.

**Date issued/revised:**

7/21/98

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# Expected Gross Annual Salary

**Definition:**

Expected tax year gross annual salary before any reductions = prior year's actual gross annual salary.

**Length/Format:**

8 / Number 999999.99

**Coding:**

Gross Annual Salary = Medicare Gross + Section 125 Contribution

**Validation:**

Required, may not be null. Default to zero.

A value must be entered or verified on-line by institution if value is zero.

**Business Rule:**

IRS tax form W2.

**Custodian:**

Director of Staff Benefits & Payroll Policy

**Physical Location:**

UWSTSA.TSA\_EMPL\_INFO.EXP\_GROSS\_ANNUAL\_SAL

UWSTSA.TSA\_TIAA.EXP\_GROSS\_ANNUAL\_SAL

**Source:**

Extracted from W2 DB2 work file data, 'medicare gross' + 'Section 125 Contribution', for UWPC institutions and extracted from W2 detail file for WARF institutions.

In 1996 there will be detail data on both files for employees of Oshkosh, Superior and Eau Claire.

In 1997 there will be detail data on both files for employees of Whitewater, LaCrosse, Platteville, Stevens Point, Stout, and River Falls.

As of year-end 1998, there will be no WARF W2 file.

Dataset is sent via ftp by UWPC.

**Date issued/revised:**

12/28/05

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## Expected Section 125 Contribution

**Definition:**

Expected total tax year annual pre-tax employee contribution to the Section 125 plan = prior year's actual contribution to Section 125.

**Length/Format:**

Number / 8 999999.99

**Coding:**

Current Section 125 = (pre-tax life + pre-tax health (including major medical) + ERA medical + ERA dependent care)

**Validation:**

Not Required. Default to zero when null.

**Business Rule:**

IRS Tax code 125.

Value to be taken from the last payroll calculation for the year preceeding the tax year.

**Custodian:**

Director of Staff Benefits & Payroll Policy

**Physical Location:**

UWSTSA.TSA\_EMPL\_INFO.EXP\_SEC\_125\_CONTR

UWSTSA.TSA\_TIAA.EXP\_SEC\_125\_CONTR

**Source:**

Extracted from W2 DB2 work file data for UWPC institutions and extracted from W2 detail file for WARF institutions.

In 1996 there will be detail data on both files for employees of Oshkosh, Superior and Eau Claire.

In 1997 there will be detail data on both files for employees of Whitewater, LaCrosse, Platteville, Stevens Point, Stout, and River Falls.

As of year-end 1998, there will be no WARF W2 file.

**Date issued/revised:**

12/28/05

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# Expected Section 403(b) Contribution (a.k.a. TSA amount)

**Definition:**

Expected tax year Section 403(b) contribution = prior year's actual contribution to Section 403(b).

**Length/Format:**

8 / Number 999999.99

**Coding:****Validation:**

Maximum allowed by IRS Tax code 403(b) for that year. Flag with warning if > maximum.

For example, for 1996 the maximum is \$12,500.

Required. May not be null, but may be zero. Default to zero when null.

A value must be entered or verified on-line by institutions if value is zero.

**Business Rule:**

IRS tax code 403(b).

Value to be taken from the last payroll calculation for the year preceeding the tax year.

NOTE: For annual update this amount is added to 'Sum Section 403(b) Contributions'.

**Custodian:**

Director of Staff Benefits & Payroll Policy

**Physical Location:**

UWSTSA.TSA\_EMPL\_INFO.EXP\_SEC\_403B\_CONTR

**Source:**

Extracted from W2 DB2 work file data, for UWPC institutions and extracted from W2 detail file for WARF institutions.

In 1996 there will be detail data on both files for employees of Oshkosh, Superior and Eau Claire.

In 1997 there will be detail data on both files for employees of Whitewater, LaCrosse, Platteville, Stevens Point, Stout, and River Falls.

As of year-end 1998, there will be noWARF W2 file.

**Date issued/revised:**

12/28/05

---

## Expected Section 457 Contribution (a.k.a. Deferred Compensation)

**Definition:**

Expected tax year annual pre-tax employee contribution to the Section 457 state deferred compensation plan, if any = prior year's actual contribution to Section 457.

**Length/Format:**

Number / 8 999999.99

**Coding:****Validation:**

Maximum allowed by IRS Tax code 457 for that year. Flag with warning if > maximum.  
For example, for 1996 the maximum is \$7,500.  
Not required. Default to 0.

**Business Rule:**

IRS tax code 457.  
A filled value indicates an employee is a 457 contributor.  
Value to be taken from the last payroll calculation for the year preceeding the tax year.  
NOTE: For annual updates this amount is added to 'Sum Section 457 Contributions'.

**Custodian:**

Director of Staff Benefits & Payroll Policy

**Physical Location:**

UWSTSA.TSA\_EMPL\_INFO.EXP\_SEC\_457\_CONTR  
UWSTSA.TSA\_TIAA.EXP\_SEC\_457\_CONTR

**Source:**

Extracted from W2 DB2 work file data, for UWPC institutions and extracted from W2 detail for WARF institutions.  
In 1996 there will be detail data on both files for employees of Oshkosh, Superior and Eau Claire.  
In 1997 there will be detail data on both files for employees of Whitewater, LaCrosse, Platteville, Stevens Point, Stout, and River Falls.  
As of year-end 1998, there will be no WARF W2 file.

**Date issued/revised:**

12/28/05

---

# Footnote

**Definition:**

Free-form text to specify additional information about an employee and related TSA and MEA.

**Length/Format:**

250 / Character

**Coding:**

Entered on-line.

**Validation:**

Not required.

**Business Rule:**

Each footnote is associated with a specific tax year and employee.

**Custodian:**

Director of Staff Benefits & Payroll Policy

**Physical Location:**

UWSTSA.TSA\_EMPL\_INFO.FOOTNOTE

**Source:**

Maintained on-line.

**Date issued/revised:**

12/28/05

---

# MEA Alternative 1 Election

**Definition:**

The alternative that allows an employee to contribute 20% of includable income - deductions plus an additional \$3,200 in order to catch up on contributions not made in earlier years.

**Length/Format:**

8 / Number 999999.99

**Coding:**

Replaced annually when returned by TIAA/CREF. On-line update allowed (mark with update date and user-id).

**Validation:**

Maximum allowed by IRS Tax code 402(g) for that year. Flag with warning if > maximum.  
For example, for 1996 the maximum is \$12,500.

**Business Rule:**

IRS tax code 402(g).

**Custodian:**

Director of Staff Benefits & Payroll Policy

**Physical Location:**

UWSTSA.TSA\_EMPL\_INFO.MEA\_ALT1\_ELECT

**Source:**

Calculated by Teachers Insurance and Annuity Association, College Retirement Equities Fund (TIAA/CREF) based on UWSA employee TSA file. The result returned by TIAA/CREF to UWSA.

**Date issued/revised:**

12/28/05

---

# MEA Alternative 2 Election

**Definition:**

This alternative takes into consideration years of service and salary to allow for a higher contribution for those employees with higher salaries.

**Length/Format:**

8 / Number 999999.99

**Coding:**

Replaced annually when returned by TIAA/CREF. On-line update allowed (mark with update date and user-id).

**Validation:**

Maximum allowed by IRS Tax code 415(c ) for that year. Flag with warning if > maximum.  
For example, for 1996 the maximum is \$9,500.

**Business Rule:**

IRS code 415(c).

**Custodian:**

Director of Staff Benefits & Payroll Policy

**Physical Location:**

UWSTSA.TSA\_EMPL\_INFO.MEA\_ALT2\_ELECT

**Source:**

Calculated by Teachers Insurance and Annuity Association, College Retirement Equities Fund (TIAA/CREF) based on UWSA employee TSA file. The result returned by TIAA/CREF to UWSA.

**Date issued/revised:**

12/28/05

---

# MEA Alternative Election Indicator

**Definition:**

This indicator specifies whether an employee ever elected TSA Maximum Exclusion Allowance (MEA) alternative 1 or alternative 2.

**Length/Format:**

1 / character

**Coding:**

CODE	TRANSLATION
A	Employee has at one time elected MEA Alternative A
B	Employee has at one time elected MEA Alternative B
N	Employee's MEA election is MEA General Limit and has never elected MEA alternative A or B (this is the default)

**Validation:**

Must be 'A', 'B', or 'N'. If this MEA Alternate Election Indicator is 'N', and the MEA Current Election Indicator changes from 'G' to 'A' or 'B', then the MEA Alternate Election Indicator must reflect the change (set to 'A' or 'B' to match the MEA Current Election Indicator). Once the MEA Alternate Election Indicator is set to 'A' or 'B' it should never be changed. The only exception is if the original choice was an error. In this case, the TSA Campus Coordinator may make a change on line. A warning message must be displayed before a change may be made.

**Business Rule:****Custodian:**

Director of Staff Benefits & Payroll Policy

**Physical Location:**

UWSTSA.TSA\_EMPL\_INFO.MEA\_ALT\_ELECT

**Source:**

Entered on line by Staff Benefits staff. Dependent upon the setting of the MEA Current Election Indicator. See validation, above.

**Date issued/revised:**

12/28/05

---

# MEA Current Election Indicator

**Definition:**

This indicates the Maximum Exclusion Allowance option, chosen by the Employee.

**Length/Format:**

1 / character

**Coding:**

CODE	TRANSLATION
A	Employee's current MEA election is MEA Alternative A
B	Employee's current MEA election is MEA Alternative B
G	Employee's current MEA election is MEA General Limit (this is the default)

**Validation:**

Must be 'G' (general) 'A' (alternative A), or 'B' (alternative B). Default is 'G'. If this value changes, a warning message must be displayed to verify the setting of the MEA Alternative Election Indicator.

**Business Rule:****Custodian:**

Director of Staff Benefits & Payroll Policy

**Physical Location:**

UWSTSA.TSA\_EMPL\_INFO.MEA\_CUR\_ELECT

**Source:**

Computer generated default. Modified or entered on line by Staff Benefits staff.

**Date issued/revised:**

12/28/05

---

# MEA General Limit

**Definition:**

The Maximum Exclusion allowance general limit complies with IRS Regulation 403(b)(2) and generally consists of approximately 20% of includable income - deductions as described in the IRS code. This is the election most often used.

**Length/Format:**

8 / Number 999999.99

**Coding:**

Replaced annually when returned by TIAA/CREF. On-line update allowed (mark with update date and user-id).

**Validation:**

Maximum allowed by IRS Tax code 403(b)(2) for that year. Flag with warning if > maximum.  
For example, for 1996 the maximum is \$9,500.

**Business Rule:**

IRS tax code 403(b)(2).

**Custodian:**

Director of Staff Benefits & Payroll Policy

**Physical Location:**

UWSTSA.TSA\_EMPL\_INFO.MEA\_GENERAL\_LIMIT

**Source:**

Calculated by Teachers Insurance and Annuity Association, College Retirement Equities Fund (TIAA/CREF) based on UWSA employee TSA file. The result returned by TIAA/CREF to UWSA.

**Date issued/revised:**

12/28/05

---

# MEA Update Date

**Definition:**

If the record is for a full-time person, this is the date the record was loaded or if later, the last date on which a user looked at the MEA worksheet. If it is for a part-time person, this is the date the record was loaded or, if later, the last date on which a user made changes to the MEA worksheet and saved the changes.

**Length/Format:**

Date

**Coding:**

Oracle automatic trigger

**Validation:****Business Rule:****Custodian:**

Director of Staff Benefits & Payroll Policy

**Physical Location:**

UWSTSA.TSA\_EMPL\_INFO.MEA\_UPDATE\_DATE

**Source:****Date issued/revised:**

12/28/05

---

# MEA Update User

**Definition:**

If the record is for a full-time person, this is the logon id of the last person who looked at the MEA worksheet. If it is for a part-time person, this is the logon id of the last person who made changes to the MEA worksheet and saved the changes. The default is the system ID used when the record is loaded.

**Length/Format:**

30 / Variable Character 2

**Coding:**

Oracle automatic trigger

**Validation:****Business Rule:****Custodian:**

Director of Staff Benefits & Payroll Policy

**Physical Location:**

UWSTSA.TSA\_EMPL\_INFO.MEA\_UPDATE\_USER

**Source:****Date issued/revised:**

12/28/05

---

# Name, First

**Definition:**

The employee's first name.

**Length/Format:**

20 / Character

**Coding:**

Full Name is physically stored as three separate data elements:

Last Name (30)

First Name (20)

Middle Initial (1)

**Validation:**

Required. If blank, must be filled in by the Institution.

**Business Rule:**

Employee reported.

**Custodian:**

Director of Staff Benefits & Payroll Policy

**Physical Location:**

UWSTSA.TSA\_EMPL\_INFO.NAME\_FIRST

UWSTSA.TSA\_TIAA.NAME\_FIRST\_INIT

**Source:**

Extracted from W2 DB2 work file data, for UWPC institutions and extracted from W2 detail file for WARF institutions. In 1996 there will be detail data on both files for employees of Oshkosh, Superior and Eau Claire.

In 1997 there will be detail data on both files for employees of Whitewater, LaCrosse, Platteville, Stevens Point, Stout, and River Falls.

As of year-end 1998, there will be no WARF W2 file.

**Date issued/revised:**

12/28/05

---

# Name, Full

**Definition:**

The full name of the employee.

**Length/Format:**

Variable / Character    Lastname, Firstname Middleinitial or  
Firstname Middleinitial Lastname

**Coding:**

Full Name is the concatenation of the three separate data elements, in the order needed:

    Last Name,  
    First Name,  
    Middle Initial

For downloads, screens and reports the full name is derived.

**Validation:****Business Rule:****Custodian:**

Director of Staff Benefits & Payroll Policy

**Physical Location:**

Derived for employee.

UWSTSA.TSA\_INST\_COORD.COORD\_NAME - 30 characters

UWSTSA.TSA\_TIAA.NAME\_FULL - 30 characters

**Source:**

Extracted from W2 DB2 work file data, for UWPC institutions and extracted from W2 detail file for WARF institutions.

In 1996 there will be detail data on both files for employees of Oshkosh, Superior and Eau Claire.

In 1997 there will be detail data on both files for employees of Whitewater, LaCrosse, Platteville, Stevens Point, Stout, and River Falls.

As of year-end 1998, there will be no WARF W2 file.

**Date issued/revised:**

12/28/05

---

# Name, Last

**Definition:**

The employee's last name.

**Length/Format:**

30 / Character

**Coding:**

Full Name is physically stored as three separate data elements:

Last Name (30)

First Name (20)

Middle Initial (1)

**Validation:**

Required. If blank, must be filled in by the Institution.

**Business Rule:**

Employee reported.

**Custodian:**

Director of Staff Benefits & Payroll Policy

**Physical Location:**

UWSTSA.TSA\_EMPL\_INFO.NAME\_LAST

UWSTSA.TSA\_TIAA.NAME\_LAST

**Source:**

Extracted from W2 DB2 work file data, for UWPC institutions and extracted from W2 detail file for WARF institutions.

In 1996 there will be detail data on both files for employees of Oshkosh, Superior and Eau Claire.

In 1997 there will be detail data on both files for employees of Whitewater, LaCrosse, Platteville, Stevens Point, Stout, and River Falls.

As of year-end 1998, there will be no WARF W2 file.

**Date issued/revised:**

12/28/05

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# Name, Middle Initial

**Definition:**

The employee's middle initial.

**Length/Format:**

1 / Character:

**Coding:**

Full Name is physically stored as three separate data elements:

Last Name	(30)
First Name	(20)
Middle Initial	(1)

**Validation:****Business Rule:**

Employee reported.

**Custodian:**

Director of Staff Benefits & Payroll Policy

**Physical Location:**

UWSTSA.TSA\_EMPL\_INFO.NAME\_MI  
UWSTSA.TSA\_TIAA.NAME\_MIDDLE\_INIT

**Source:**

Extracted from W2 DB2 work file data, for UWPC institutions and extracted from W2 detail file for WARF institutions. In 1996 there will be detail data on both files for employees of Oshkosh, Superior and Eau Claire. In 1997 there will be detail data on both files for employees of Whitewater, LaCrosse, Platteville, Stevens Point, Stout, and River Falls. As of year-end 1998, there will be no WARF W2 file.

**Date issued/revised:**

12/28/05

---

# Retirement Category

**Definition:**

General category of state employee classification while contributions is being made to the Wisconsin Retirement System.

**Length/Format:**

2 / Character

**Coding:**

RETIREMENT CATEGORY CODE	EMPLOYMENT CATEGORY TRANSLATION	RETIREMENT PLAN	RETIREMENT PLAN CODE
00	General	General	G
03	Protective with Social Security	Protective	P
10	Teacher	General	G
11	Teacher, Executive Retirement Plan	Executive	E
13	Not covered by WRS	None	N

**Validation:**

Must be one of the above employment categories, or valid per the Retirement Category table.  
Retirement category code 13 is arbitrarily assigned to employees not covered by WRS. Default to '13'.

**Business Rule:**

Wisconsin Statutes, Chapter 40, Public Employee Trust Fund.  
Each Employment Category is associated with only one Retirement Plan.

**Custodian:**

Director of Staff Benefits & Payroll Policy

**Physical Location:**

UWSTSA.TSA\_EMPL\_INFO.RETIREMENT\_CAT  
UWSTSA.TSA\_RET\_CAT.RET\_CAT  
UWSTSA.TSA\_RET\_CAT.RET\_CAT\_DESC

**Source:**

Initially extracted from 'ETF' data, (for all institutions). Dataset is sent via ftp by UWPC. The actual data element sent is the English translation of the last filled in occurrence of employment category (sob\_empt\_cat) . Annually updated from the annual tape that is sent to DETF by WARF and UWPC.

NOTE: There may be records on the DETF Annual Detail Report tape that will not match to records on the annual extract of W2 TSA records due to the fact that records are reported to DETF throughout the year for those individuals terminating, retiring, etc.

In 1996 there will be detail data on both files for employees of Oshkosh, Superior and Eau Claire.  
In 1997 there will be detail data on both files for employees of Whitewater, LaCrosse, Platteville, Stevens Point, Stout, and River Falls.

**Date issued/revised:**

10/3/96

---

# Retirement Plan

**Definition:**

The retirement plan determines:

1. The Percent of contribution to retirement by the employer
2. The formula factor for calculating retirement benefits.

**Length/Format:**

1 / Character

**Coding:**

RETIREMENT CATEGORY CODE	EMPLOYMENT CATEGORY TRANSLATION	RETIREMENT PLAN	RETIREMEN T PLAN CODE
00	General	General	G
03	Protective with Social Security	Protective	P
10	Teacher	General	G
11	Teacher, Executive Retirement Plan	Executive	E
13	Not covered by WRS	None	N

**Validation:**

Must be one of the above retirement plans, or valid per the Retirement Plan table.

**Business Rule:**

Wisconsin Statutes, Chapter 40, Public Employee Trust Fund

Each Retirement Plan may be associated with one or more Employee Retirement categories.

**Custodian:**

Director of Staff Benefits & Payroll Policy

**Physical Location:**

UWSTSA.TSA\_TIAA.RETIREMENT\_PLAN

UWSTSA.TSA\_RET\_PLAN.RET\_PLAN

UWSTSA.TSA\_RET\_PLAN.RET\_PLAN\_DESC

UWSTSA.TSA\_RET\_PLAN.RET\_CAT

**Source:**

Derived from Table of Retirement Category Codes and Retirement Plan names.

**Date issued/revised:**

12/28/05

---

# Social Security Number

**Definition:**

The unique nine-digit social security number assigned to the employee by the Social Security Administration or other proper authority.

**Length/Format:**

9 / Character

**Coding:****Validation:**

Required, may not be null. May not be updated.

**Business Rule:**

Federal Social Security Administration.

SSN + Tax Year + Institution uniquely identifies an individual employee with TSA contributions.

**Custodian:**

Director of Staff Benefits & Payroll Policy

**Physical Location:**

UWSTSA.TSA\_EMPL\_INFO.SSN

UWSTSA.TSA\_TIAA.SSN

**Source:**

Extracted from payroll data, for population of employees with TSA contributions. Datasets are sent via ftp by UWPC.

**Date issued/revised:**

10/3/96

---

# State

**Definition:**

The state code portion of the address.  
When associated with the employee it is the home address.  
When associated with the Institution Coordinator, it is the work address.

**Length/Format:**

2 / Character

**Coding:**

When creating the TIAA/CREF dataset, concatenate City, State, Zip into one address line.

**Validation:**

Must be valid two character postal code for state.  
The address may be unknown or blank.  
If the employee address is unknown, then the address of the TSA 'Institution coordinator' should be used when needed.

**Business Rule:**

Employee reported.  
For TIAA/CREF, the full name and the address lines, EXACTLY as provided in the data file, will be used as the mailing address (see 6/13/96 letter from TIAA/CREF)

**Custodian:**

Director of Staff Benefits & Payroll Policy

**Physical Location:**

UWSTSA.TSA\_EMPL\_INFO.STATE  
UWSTSA.TSA\_INST\_COORD.STATE  
UWSTSA.TSA\_TIAA.ADDR\_3  
UWSTSA.TSA\_TIAA.ADDR\_4

**Source:**

Initially extracted from 'ETF' data, (for all institutions). Dataset is sent via ftp by UWPC. Annually updated from the annual tape that is sent to DETF by WARF and UWPC.

NOTE: There may be records on the DETF Annual Detail Report tape that will not match to records on the annual extract of W2 TSA records due to the fact that records are reported to DETF throughout the year for those individuals terminating, retiring, etc.

In 1996 there will be detail data on both files for employees of Oshkosh, Superior and Eau Claire.  
In 1997 there will be detail data on both files for employees of Whitewater, LaCrosse, Platteville, Stevens Point, Stout, and River Falls.

**Date issued/revised:**

10/3/96

---

# Sum of Excess Deferrals (a.k.a. Sum Section 402(g) Priors; a.k.a. Accumulated Catch-up)

**Definition:**

Sum of Section 403(b) elective deferrals in excess of \$9,500 contributed each year from 1/1/87 (or from date of employment if later) to 12/31, of year preceding the tax year. This amount is also known as the 'sum of Section 402(g) priors'; and also known as 'accumulated catch-up'.

**Length/Format:**

8 / Number 999999.99

**Coding:**

Each year the prior year's 'Section 403(b) Contribution' amount - \$9,500 is added to this total-to-date amount:  
Sum of Excess Deferrals = Sum of Excess Deferrals + (Expected Section 403(b) Contribution - \$9,500).

**Validation:**

Maximum allowed by IRS tax code 402(g) for that year. Flag and report with warning if > maximum.

For example, in 1996 the maximum is \$15,000.

When creating the file for TIAA/CREF: for amounts > maximum, default to maximum on the output dataset only (leave the database as is).

Not required. Default to zero when null.

**Business Rule:**

IRS tax code 402(g).

**Custodian:**

Director of Staff Benefits & Payroll Policy

**Physical Location:**

UWSTSA.TSA\_EMPL\_INFO.SUM\_EXCESS\_DEF\_402G

UWSTSA.TSA\_TIAA.SUM\_EXCESS\_DEF\_402G

**Source:**

Extracted from report 'JPY0617H' payroll data, (for UWPC institutions). During initial database load, amounts greater than the maximum were defaulted to the maximum, because corrections had previously been made by the Payroll and Staff Benefits office.

Dataset is sent via ftp by UWPC.

Data may be entered on-line.

No extraction required after initial load.

**Date issued/revised:**

12/28/05

---

# Sum of Non-WRS Service

**Definition:**

The employee's total years of service at the University of Wisconsin in position(s) not covered by the Wisconsin Retirement System to the end of the previous calendar year, based on full-time equivalency

**Length/Format:**

4 / Number 99.99

**Coding:**

This data is not collected automatically. It must be supplied by the employee and recorded in the database by the coordinator. Automatic processes do not overwrite this field.

The value is updated annually by adding to it the value in the Expected Annual non-WRS Service field.

**Validation:**

Required, may not be null. Defaults to 00.00.

**Business Rule:**

For purposes of MEA calculation, the Sum of non-WRS Service should reflect the employee's number of years of service working at the University of Wisconsin in positions eligible for TSA but not covered by the Wisconsin Retirement System.

Examples: employment as a teaching assistant, project or program assistant, limited term employee, or short-term academic appointee. Years of WRS service that were forfeited and have not been repurchased should also be included in this field.

Years are based on the amount of work that would be considered full-time for that position. Thus for 9-month academic positions a full year is the equivalent of two semesters of full-time work, and for 12-month unclassified and classified positions a full year is 2,080 hours.

**Custodian:**

Assistant Director of Staff Benefits & Payroll Policy

**Physical Location:**

UWSTSA.TSA\_EMPL\_INFO.SUM\_NON\_WRS\_SERVICE

**Source:**

This data is not collected automatically. It must be supplied by the employee and recorded in the database by the coordinator.

**Date issued/revised:**

7/21/98

---

# Sum Section 403(b) Contributions

**Definition:**

Sum of all prior years' Section 403(b) contributions from date of employment in the UW System to 12/31, of the year preceding the tax year.

**Length/Format:**

8 / Number 999999.99

**Coding:**

Each year the prior year's 'Section 403(b) Contribution' amount is added to this total-to-date amount:  
$$\text{Sum Section 403(b) Contributions} = \text{Sum Section 403(b) Contributions} + \text{Expected Section 403(b) Contribution.}$$

**Validation:**

Required. May not be null, but may be zero. Default to zero when null.  
A value must be entered or verified on-line by institutions if value is zero.

**Business Rule:**

IRS tax code 403(b).

**Custodian:**

Director of Staff Benefits & Payroll Policy

**Physical Location:**

UWSTSA.TSA\_EMPL\_INFO.SUM\_SEC\_403B\_CONTR  
UWSTSA.TSA\_TIAA.SUM\_SEC\_403B\_CONTR

**Source:**

Extracted from report 'JPY0617D' payroll data (accumulated amounts for all deduction codes *except* 099, for each unique SSN), (for UWPC institutions). Dataset is sent via ftp by UWPC.  
Data may be entered on-line.  
No extraction required after initial load.

**Date issued/revised:**

12/28/05

---

# Sum Section 457 Contributions

**Definition:**

Sum of Employee contributions to the Section 457 plan from 12/31/78 (or date of employment if later) to 12/31, of year preceding the tax year.

**Length/Format:**

8 / Number 999999.99

**Coding:**

Each year the prior year's 'Section 457 Contribution' amount is added to this total-to-date amount.

Sum Section 457 Contributions = Sum Section 457 Contributions + Expected Section 457 Contribution.

**Validation:**

Not required. Default to zero when null.

No on-line updates allowed.

**Business Rule:**

IRS tax code 457.

**Custodian:**

Director of Staff Benefits & Payroll Policy

**Physical Location:**

UWSTSA.TSA\_EMPL\_INFO.SUM\_SEC\_457\_CONTR

UWSTSA.TSA\_TIAA.SUM\_SEC\_457\_CONTR

**Source:**

Extracted from report 'JPY0617D' payroll data (accumulated amounts for deduction code 099 *only*, for each unique SSN), (for UWPC institutions). Dataset is sent via ftp by UWPC.

Data may be entered on-line.

No extraction required after initial load.

**Date issued/revised:**

12/28/05

---

# Sum WRS Employee Contributions (a.k.a. Investment in Contract)

**Definition:**

Sum of after tax required employee contributions to the retirement plan from date of employment to 12/31, of year preceding the tax year. This amount is the employee's investment in WRS.

**Length/Format:**

8 / Number 999999.99

**Coding:**

Sum of WRS Employee Contributions = Sum of WRS Employee Contributions + Annual Contribution

**Validation:**

Not required. Default to zero when null.

Not modifiable on-line.

**Business Rule:**

Wisconsin Statutes, Chapter 40, Public Employee Trust Fund

**Custodian:**

Director of Staff Benefits & Payroll Policy

**Physical Location:**

UWSTSA.TSA\_EMPL\_INFO.SUM\_WRS\_CONTR

UWSTSA.TSA\_TIAA.SUM\_WRS\_CONTR

**Source:**

Initially extracted from 'ETF' data (etf.sob\_iic) for all institutions. Annually updated from the annual tape that is sent to DETF by WARF and UWPC (data element "employee required Contributions, employee paid plus benefit adjustment contributions employee paid")

NOTE: There may be records on the DETF Annual Detail Report tape that will not match to records on the annual extract of W2 TSA records due to the fact that records are reported to DETF throughout the year for those individuals terminating, retiring, etc.

In 1996 there will be detail data on both files for employees of Oshkosh, Superior and Eau Claire.

In 1997 there will be detail data on both files for employees of Whitewater, LaCrosse, Platteville, Stevens Point, Stout, and River Falls.

Dataset is sent via ftp by UWPC.

**Date issued/revised:**

12/28/05

---

# Sum WRS Service

**Definition:**

The years of creditable service belonging to the employee under the Wisconsin Retirement System at the University of Wisconsin at the end of the previous year.

**Length/Format:**

4 / Number 99.99

**Coding:**

This field was initialized using the total years of WRS service credited to the employee by the Department of Employee Trust Funds as of 12/31/96.

Users should be aware that this data is imperfect for TSA purposes:

- Persons who were not included on the 12/31/96 Statement of Account information provided by DETF to the University have an initial value in this field of 0.00. This group includes new hires or employees rehired after 1996 and rehired annuitants with prior WRS coverage though no current WRS coverage.
- The value includes all WRS service, both UW and non-UW.

Manual corrections to the field may be needed.

**CAUTION:** The value in this field carries forward into subsequent years. The value is adjusted annually by adding the service earned in the current tax year:

Sum WRS Service = Sum WRS Service + Expected Annual WRS Service

**Validation:**

Required; may not be null. Defaults to 00.00.

**Business Rule:**

For purposes of MEA calculation, the Sum of WRS Service reflects the actual number of years of service credited to the employee by DETF to the end of the previous calendar year. For employees who have some WRS service from non-UW employment, or whose WRS service is not reflected in the total, a manual adjustment by the coordinator must be made.

**Custodian:** Director of Staff Benefits & Payroll Policy

**Physical Location:**

UWSTSA.TSA\_EMPL\_INFO.SUM\_WRS\_SERVICE

**Source:**

Initially extracted from 'ETF' data as of 12/31/96. Dataset was accessed through InfoAccess.

The actual data element used is the 'Total years of creditable service'

(UW\_UA\_EMPLOYEE\_TOTAL\_SERVICE\_TOTAL\_CREDIT\_YEARS).

Annually updated from the annual tape that is sent to DETF (File Name: MEA.CALC 1 for UWPC, data element name "fiscal year hours or calendar year hours"). Calculated by dividing calendar year hours for retirement categories 00, 03, and 11 by 1904, and dividing calendar year hours for retirement categories 10 by 1320.

For 1997, hours credited prior to payroll merger for employees of Whitewater, LaCrosse, Platteville, Stevens Point, Stout, and River Falls were extracted from unadjusted files maintained by WARF payroll.

**Date issued/revised:**

7/21/98

---

# Tax Year

**Definition:**

December 31 of the tax year in which the TSA contribution is made for purposes of calculating the Maximum Exclusion Allowance (MEA). The current year for MEA calculation is based on the prior year's salary. For example, when calculating MEA in January of 1997 for salaries earned in 1996, the tax year is 1997/12/31.

**Length/Format:**

Date / YYYYMMDD

**Coding:**

Computer Generated.

**Validation:**

Not updateable on-line.  
Required, may not be null.

**Business Rule:**

Federal Tax year filing April 15<sup>th</sup> + 1.  
SSN + Institution + Tax Year uniquely identifies an individual employee with TSA contributions.

**Custodian:**

Director of Staff Benefits & Payroll Policy.

**Physical Location:**

UWSTSA.TSA\_EMPL\_INFO.TAX\_YEAR  
UWSTSA.TSA\_TIAA.TAX\_YEAR

**Source:**

Computer generated.

**Date issued/revised:**

10/3/96

---

# Update Date

**Definition:**

Identifies the date/time TSA data in current table was most recently updated.

**Length/Format:**

30 / Character

**Coding:**

Computer generated.

**Validation:**

Default to system sysdate on insert and update for entire record; on update only for MEA data.

**Business Rule:****Custodian:**

Director of Staff Benefits & Payroll Policy

**Physical Location:**

UWSTSA.TSA\_EMPL\_INFO.UPDATE\_DATE  
UWSTSA.TSA\_EMPL\_INFO.MEA\_UPDATE\_DATE

**Source:**

Data entry.

**Date issued/revised:**

11/15/96

---

# Update ID

**Definition:**

Identifies the person, by application login id, who last updated TSA data.

**Length/Format:**

30 / Character

**Coding:**

Computer generated.

**Validation:**

Default to system user on insert and update for entire record; on update only for MEA data.

**Business Rule:****Custodian:**

Director of Staff Benefits & Payroll Policy

**Physical Location:**

UWSTSA.TSA\_EMPL\_INFO.UPDATE\_USER

UWSTSA.TSA\_EMPL\_INFO.MEA\_UPDATE\_USER

**Source:**

Data entry.

**Date issued/revised:**

11/15/96

---

# Vendor

**Definition:**

Identifies a TSA vendor.

**Length/Format:**

3 / Character

**Coding:**

CODE	NAME
002	STRS TSA-Fixed
003	STRS TSA-Var
025	National Guardian Life - TSA
027	Thrift Savings Plan - 5%
030	IDS Life Ins. Co. - TSA
031	Security Benefit Life - TSA
032	Great American Life - TSA
035	TIAA CREF SRA - TSA
038	TIAA CREF RA - TSA
041	Scudder Funds - TSA
042	Strong Funds - TSA
043	Dreyfus Shareholder Serv Group - TSA
044	Fidelity Investments - TSA
045	T. Rowe Price - TSA
048	American Unit Life Ins Co - TSA
051	Lincoln Natl. Life Ins Co - TSA
060	Aetna Variable Annuity
066	Metropolitan Life
099	Deferred Compensation

**Validation:****Business Rule:****Custodian:**

UWSA Director of Staff Benefits & Payroll Policy  
UWPC Employee Compensation and Benefits Services

**Physical Location:**

UWSTSA.TSA\_VENDOR.VENDOR\_CODE  
UWSTSA.TSA\_VENDOR.VENDOR\_DESC

**Source:**

Data entry.

**Date issued/revised:**

11/18/96

---

# Vendor Contribution

**Definition:**

Identifies the TSA amount an employee contributes in a specific tax year to a specific TSA Vendor.

**Length/Format:**

8 / Number 999999.99

**Coding:**

Replaced annually based on payroll data.

**Validation:**

See Vendor for codes and translations

**Business Rule:**

An employee may contribute TSA amounts to one or more Vendors.

**Custodian:**

Director of Staff Benefits & Payroll Policy

**Physical Location:**

UWSTSA.TSA\_EMPL\_VENDOR.VENDOR\_CONTRIB

**Source:**

Extracted from report 'JPY0617I' payroll data, (for UWPC institutions). There is no data for WARF.

Note: In 1996 there will be partial data for Oshkosh, Superior and Eau Claire. In 1997 there will be partial data for LaCrosse, Platteville, Whitewater, River Falls, Stout and Stevens Point. In 1998 all campuses will have complete records on 'JPY0617I'.

Annually updated from payroll data. Datasets are sent annually via ftp by UWPC.

**Date issued/revised:**

10/3/96

---

# Years of Service

**Definition:**

The employee's total years of creditable service at the University of Wisconsin, adjusted for breaks in service.

**Length/Format:**

4 / Number 99.99

**Coding:**

The years are the total years of creditable service adjusted annually:

Total Years of Service = Total Years of Service + annual Years of Service

Annual Years of Service is determined as follows:

For retirement (employment) category 00 and 03 divide the calendar year hours by 1904

For retirement (employment) category 10 and 11 divide the fiscal year hours by 1320.

*For employees newly added to the TSA database (whether new employee or current employee just beginning TSA contribution) the years of service from the DETF Annual Statement of Benefit file will be used in addition to the data from the annual WRS File. There may be some individuals that do not have previous WRS service and therefore will not be present on the DETF Annual Statement of Benefit file.*

This data is used to calculate Date of Employment as follows (see definition):

Date of Employment = Tax year - (Years of Service \* 365)

**Validation:**

Required, may not be null.

**Business Rule:**

For purposes of MEA calculation, the years of service should reflect number of years of service, based upon the date the employee started working at the University of Wisconsin (not other state agencies), adjusted for breaks in service.

**Custodian:**

Director of Staff Benefits & Payroll Policy

**Physical Location:**

UWSTSA.TSA\_EMPL\_INFO.YEARS\_OF\_SERVICE

**Source:**

Initially extracted from 'ETF' data. Dataset is sent via ftp by UWPC.

The actual data element sent is the 'Total years of creditable service' (etf.sob\_tot\_crdbl\_service).

Note: The ETF data is received for the prior year service and so initially, the ETF total years of creditable service must be adjusted by a year (+1) to make up for the time lapse.

Annually updated from the annual tape that is sent to DETF by WARF and UWPC (data element name "fiscal year hours or calendar year hours"). Calculated by dividing calendar year hours for retirement categories 00 and 03 by 1904, and dividing fiscal year hours for retirement categories 10 and 11 by 1320.

NOTE: There may be records on the DETF Annual Detail Report tape that will not match to records on the annual extract of W2 TSA records due to the fact that records are reported to DETF throughout the year for those individuals terminating, retiring, etc.

In 1996 there will be detail data on both files for employees of Oshkosh, Superior and Eau Claire.

In 1997 there will be detail data on both files for employees of Whitewater, LaCrosse, Platteville, Stevens Point, Stout, and River Falls.

As of year-end 1998, there will be no WARF WRS file.

**Date issued/revised:**  
11/5/96

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# Zip code

**Definition:**

The zip code portion of the address.  
When associated with the employee it is the home address.  
When associated with the Institution Coordinator, it is the work address.

**Length/Format:**

9 / Character

**Coding:**

When creating the TIAA/CREF dataset, concatenate City, State, Zip into one address line.

**Validation:**

Must be valid postal zip code.  
The address may be unknown or blank.  
If the employee address is unknown, then the address of the TSA 'Institution coordinator' should be used when needed.

**Business Rule:**

Employee reported.  
For TIAA/CREF, the full name and the address lines, EXACTLY as provided in the data file, will be used as the mailing address (see 6/13/96 letter from TIAA/CREF)

**Custodian:**

Director of Staff Benefits & Payroll Policy

**Physical Location:**

UWSTSA.TSA\_EMPL\_INFO.ZIP  
UWSTSA.TSA\_INSTITUTION\_COORD.ZIP\_CODE  
UWSTSA.TSA\_TIAA.ADDR\_3  
UWSTSA.TSA\_TIAA.ADDR\_4

**Source:**

Initially extracted from 'ETF' data, (for all institutions). Dataset is sent via ftp by UWPC. Annually updated from the annual tape that is sent to DETF by WARF and UWPC.

NOTE: There may be records on the DETF Annual Detail Report tape that will not match to records on the annual extract of W2 TSA records due to the fact that records are reported to DETF throughout the year for those individuals terminating, retiring, etc.

In 1996 there will be detail data on both files for employees of Oshkosh, Superior and Eau Claire.  
In 1997 there will be detail data on both files for employees of Whitewater, LaCrosse, Platteville, Stevens Point, Stout, and River Falls.

**Date issued/revised:**

10/3/96



# Glossary of Terms



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