

Completing the Rehired Annuitant Form



An **annuitant** is a person who is receiving a monthly retirement benefit (annuity) from the Wisconsin Retirement System. If an annuitant returns to work for *any* WRS employer, a [Rehired Annuitant Form \(ET-2319\)](#) must be completed upon rehire.

In general, **rehired annuitants** must have a valid termination and be separated from WRS employment for at least 75 calendar days before they can return to WRS-covered employment. Exceptions may apply. See *Chapter 15, Subsection 1501* of the [WRS Administration Manual](#) for more information.

This guide will show you how to use the **Previous Service and Benefit Inquiry (PSBI)** application to complete the [Rehired Annuitant Form \(ET-2319\)](#). You must have an active user ID and password and be granted access to the PSBI application. Online access can be added or changed using the [Online Access Security Agreement \(ET-8928\)](#) form. For more information, see [Update Online Access](#).

If you have any questions, please contact your WRS Case Manager.

LOOK UP AN EMPLOYEE

1. Go to the [ETF Web Applications for Employers](#) page and click on the **Previous Service and Benefit Inquiry Application** button. You will see the login screen.
2. Enter your **User ID** and **Password**, then click **Login**.
3. Select whether you are a **Local Employer** or a **State Employer** and enter your 7-digit **ETF Employer ID** number (no dashes or spaces).
4. Click the **Submit** button. The PSBI page will appear.
5. Enter the **Employee Social Security** number *or* the employee's 8-digit **ETF Member ID** number in the applicable field. Do not use dashes or spaces.
6. Select the **Employee's New Employment Category** from the drop-down menu. This is the category the employee will be enrolled in *if they are eligible*.
7. Click the **Inquire** button. The following results will be displayed:
 - Employee Name
 - Employee Date of Birth
 - Eligibility Criteria
 - Employee Benefit Information (Retirement or Lump Sum)
 - Minimum Break in Service Information

The image shows two screenshots of the PSBI application interface. The top screenshot shows the login screen with fields for User ID, Password, and Employer Identification Number. The bottom screenshot shows the main application page with fields for Employee Social Security Number or ETF Member ID, and a drop-down menu for Employee's New Employment Category. Red boxes and numbers 1 through 7 highlight the specific steps mentioned in the list.

REVIEW BENEFIT STATUS & ELIGIBILITY CRITERIA

1. If the employee is a rehired annuitant, the **Annuity** box will be checked and you will see a link to the **ET-2319 Rehired Annuitant Form** with the message: *"This member is receiving an annuity, you must file ET-2319 Rehired Annuitant Form on their behalf."* Click the link for the most recent version of the ET-2319 form.
2. Next, verify if the **Minimum Break in Service** has been met. If the rehired annuitant has not met the break in service, please contact your WRS Case Manager before proceeding.
3. The rehired annuitant's **Eligibility Criteria** will be displayed above their name. You will note that WRS eligibility for rehired annuitants is the same as eligibility for active employees.
4. The last piece of information you will need to complete the ET-2319 is the employee's *most recent termination date* from the **Previous Service** section.

Step 1: Enter Employee Social Security Number: 1: (000000000)
-OR- Enter ETF Member ID: 12345678

Select Employee's New Employment
Step 2: Category: 30 - GENERAL
Inquire

Eligibility Criteria: 1200 hours and one year

Name: DOE, JOHN X
Birthdate: 12/01/1958

Retirement Annuity Information
Annuity: ☒ **ET-2319 Rehired Annuitant Form** This member is receiving an annuity, you must file ET-2319 Rehired Annuitant Form on their behalf.

Minimum Break in Service Ends: 08/22/2017
Annuity Benefit Effective Date: 06/08/2017

Lump Sum (Separation or Retirement) Benefit Information
Taken Lump Sum Benefit: ☐

Previous Service (Dates prior to 1985 do not display)

State	Category	Enrollment Date/ Begin Date Change	Termination Date	Local	Category	Enrollment Date/ Begin Date Change	Termination Date
				1234-000	00	01/01/1990	06/30/1997
				1234-000	12	07/01/1997	06/30/2011
				1234-000	42	06/30/2011	06/07/2017

Message: No state service or local service.

Rehired Annuitant Termination Date & WRS Participation Requirements

Termination *before* July 2, 2013

May elect whether to participate in the WRS if the position meets WRS participation requirements. There are two choices:

1. **Remain an annuitant**

This option allows the annuitant to continue their annuity while they return to work. Annuitants who choose this option *may not* enroll in any ETF-administered insurance benefits the employer may carry. Any insurance coverage the annuitant already has will continue.

2. **Elect coverage under the WRS**

This option allows the annuitant to suspend their annuity and participate in the WRS as an active employee until they terminate all WRS-covered employment and re-retire. Annuitants electing to participate must be offered any ETF-administered insurances the employer may carry.

Termination *on or after* July 2, 2013

Must suspend annuity and participate in the WRS as an active employee if the position meets WRS participation requirements. The employee's participation will continue until they terminate all WRS-covered employment and re-retire.

Rehired annuitants with mandatory participation must be offered any ETF-administered insurances the employer may carry.

Reminder: Just like active employees, a rehired annuitant who does not meet the WRS eligibility requirements on their date of hire can become eligible later and must be enrolled. **A new Rehired Annuitant Form (ET-2319) must be completed any time expectations change.**

COMPLETE THE REHIRED ANNUITANT FORM (ET-2319)

There are three main sections of the ET-2319. The employer completes the top section, and the employee completes the remaining sections. Instructions are provided below.

EMPLOYER COMPLETES	
Employer Name	Employer's legal name
ETF Employer ID	Employer's 7-digit ETF Employer ID. Do not use the employer's TIN.
ETF-administered insurance employer participation	If the employee is WRS eligible, check any ETF-administered insurances the employer carries.
Hire/Rehire Date	Newly Hired: Enter the date the employee will begin their new position
	Expectation Change/Met Expectations: If a rehired annuitant has an expectation change or meets WRS eligibility on their 12-month anniversary or a rolling look-back, enter the date the employee met expectations or the date their expectations changed.
WRS termination date	Use the Previous Service and Benefit Inquiry (PSBI) to enter the <i>most recent</i> termination date listed. See example in Step 4 of the <i>REVIEW BENEFIT STATUS & ELIGIBILITY CRITERIA</i> section.
Employee Name	Employee's legal name
Birth Date	Employee's complete date of birth
ETF Member ID	The employee's ETF Member ID is on the Previous Service and Benefit Inquiry screen.
WRS employment category	Enter the WRS employment category based on position description. If the employee is not WRS eligible, enter the category they <i>would be</i> enrolled in.
Expected duration of employment	A specific number of months the employee is expected to work is required unless the position is permanent, in which case the terms "permanent" or "indefinite" may be used. Do not use statements such as "less than 12 months" in this field.
Hours expected to work	Must reflect the actual number of hours expected in a 12-month period. Do not use statements such as "less than 440/880 hours" or "less than 600/1200 hours" in this field.
Is the person hired as a contractor?	An independent contractor or third-party contractor means the annuitant is: <ul style="list-style-type: none"> • Not classified as an employee of the employer, and • Not paid out of the employer's payroll
Agent signature, telephone, and date	Must be completed by the WRS agent or alternate agent.
EMPLOYEE COMPLETES	
Gender	Employee's gender
Address	Employee's current mailing address
Box 1: WRS Termination Date before 07/02/2013	Only complete if the WRS termination date at the top of the form is before 07/02/2013. Employee must select one option based on eligibility. If the employee is participating <i>and</i> the employer offers ETF-administered insurance benefits, the employee must select which benefits (if any) they are applying for.
Box 2: WRS Termination on or after 07/02/2013	Only complete if the WRS termination date at the top of the form is on or after 07/02/2013. Employee must select one option based on eligibility. If the employee is participating <i>and</i> the employer offers ETF-administered insurance benefits, the employee must select which benefits (if any) they are applying for.
Employee Signature and Date	Must be completed by the employee on or after their hire/rehire date.

EXAMPLE: COMPLETED REHIRED ANNUITANT FORM



Rehired Annuitant Form

Wis. Stat. § 40.26 (1) and (1m)

HIGHLIGHTED FIELDS ARE REQUIRED

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

Employer: Complete, Sign and date below. Refer to Previous Service & Benefit Inquiry Application on ETF's website or contact ETF. Make one copy for your records and one copy for your employee. Submit the original to ETF.

Employer name (if state of Wisconsin, include dept.) TOWN OF ANYTOWN	ETF Employer ID 69-036- 1234-001	For ETF Use Only WRS Term Date
ETF-administered insurance employer participation (applicable if WRS eligible) <input checked="" type="checkbox"/> Health <input type="checkbox"/> Life <input type="checkbox"/> ICI <input checked="" type="checkbox"/> if employer participates	Hire/Rehire date 03/02/2022	Benefits Effective Date WRS Enrollment Date

WRS termination date

06/07/2017

Employee name (first, middle, last) JOHN X DOE	Birth date (MM/DD/YYYY) 12/01/1958	ETF Member ID 10000005
WRS employment category 30	Expected duration of employment (number of months) 12	Hours expected to work (per year) 2080

Is the person hired as a contractor? (Contractors complete one of the boxes below depending on WRS termination date. Third-party contractors must only sign and date the form below) ☐ Yes (Third-party) ☐ Yes (Independent) ☒ No

Agent:
Sign here and
send to ETF

I understand that Wis. Stat. § 943.395 provides criminal penalties for knowingly making false or fraudulent claims on this form and hereby certify that, to the best of my knowledge and belief, the above information is true and correct. I certify that I am responsible for reporting coverage information to the Wisconsin Retirement System.

Signature and title of agent

Angela Smith

HR DIRECTOR

Telephone

888-123-4567 EXT 4

Date

03/02/2022

Employee: Complete below, choose applicable option in Box 1 or Box 2, then sign and date.

Gender
☒ Male ☐ Female

Address (street, city, state, ZIP)

123 MAIN STREET ANYTOWN, WI 51234

Box 1: WRS Termination Date Was Prior to July 2, 2013—Employee Election Under Wis. Stat. § 40.26 (1)

I certify I had a valid termination and am currently receiving a WRS annuity. WRS eligibility criteria is that the employee is expected to work at least 600 hours (440 for teachers and school support staff) and be employed for at least one year. (Note: The 600 hours rule applies to educational support personnel at technical colleges and CESAs.)

- ☐ **I Am Not Eligible** to participate in the WRS since my position is **not** expected to require 600 hours (440 for teachers and school support staff) and last at least one year. Should I become eligible, I understand that I need to complete a new *Rehired Annuitant Form* (ET-2319).
- ☐ **I Elect to Actively Participate in the WRS.** I understand my WRS annuity will be suspended and WRS coverage will begin effective the first of the month following ETF's receipt of this election. ☐ Health ☐ Life ☐ ICI ☐ None (if employer participates information.)
- ☐ **I Do Not Elect** to actively participate in WRS pursuant to Wis. Stat. § 40.26 (1). I understand I may elect to actively participate in the WRS at any time in the future, provided I meet the WRS eligibility criteria for participation, by filing an updated form.

Box 2: WRS Termination Date Was On or After July 2, 2013—Annuity Suspension Under Wis. Stat. § 40.26(1m)

I certify I had a valid termination, am receiving a WRS annuity and have remained terminated from all WRS participating employment for a minimum of 75 days. WRS eligibility criteria is that the employee is expected to work at least 1,200 hours (880 for teachers and school support staff) and be employed for at least one year. (Note: The 1,200 hours rule applies to educational support personnel at technical colleges and CESAs.)

- ☐ **I Elect** to actively participate in the WRS as an active employee because my position is expected to last one year and require 600 hours of service (440 hours for teachers and educational support staff) but is not expected to require 1,200 hours of service (880 hours for teachers and educational support staff). I understand my WRS annuity will be suspended and WRS coverage will begin the first of the month following ETF's receipt of this election. ☐ Health ☐ Life ☐ ICI ☐ None (Refer to page 2 for more information.)
- ☐ **It Is Not Expected** that my employment will last at least one year and require 1,200 hours of service (880 hours for teachers and educational support staff). I understand that my WRS annuity will continue and no WRS credit will be provided for my service. However, should expectations change, or I meet the eligibility criteria, a new form will be required and my annuity will be suspended at that time.
- ☒ **It Is Expected** that my employment will last at least one year and require 1,200 hours of service (880 hours for teachers and educational support staff). I understand and acknowledge that my WRS annuity will be suspended effective the first of the month following my hire date and remain suspended until I again terminate all WRS employment. I elect to participate in the following insurances: ☐ Health ☐ Life ☐ ICI ☒ None (Refer to page 2 for more information.)
- ☐ **Expectations Met** – The expectations of hours to be worked and/or duration of employment has changed to where my employment meets both the WRS eligibility criteria. I understand and acknowledge that my WRS annuity will be suspended effective the first of the month following the date WRS expectations were met and remain suspended until I again terminate all WRS employment. I elect to participate in the following insurances: ☐ Health ☐ Life ☐ ICI ☐ None (Refer to page 2 for more information.)

Employee: Sign Here	Employee signature <i>John Doe</i>	Date (MM/DD/YYYY) 03/02/2022
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EMPLOYEE PARTICIPATION OPTIONS

Box 1: WRS Termination Before to 07/02/2013

I Am Not Eligible

Position does not meet WRS eligibility criteria displayed in PSBI. Employee will not be enrolled.

I Elect to Actively Participate in the WRS

Position meets WRS eligibility criteria displayed in PSBI **and** employee wants to suspend their annuity and participate as an active employee.

Employer must provide applications for any ETF-administered insurance benefits

I Do Not Elect

Position meets WRS eligibility criteria displayed in PSBI but employee wants to continue their annuity.

Box 2: WRS Termination On or After 07/02/2013

I Elect

Position will require at least one year and between 600 and 1199 hours (440 - 779 for teachers/educational support) **and** employee wants to suspend their annuity to participate as an active employee.

Employer must provide applications for any ETF-administered insurance benefits.

It Is Not Expected

Position does not meet WRS eligibility criteria displayed in PSBI. Employee will not be enrolled.

It Is Expected

Position meets WRS eligibility criteria displayed in PSBI and employee is **required** to participate.

Employer must provide applications for any ETF-administered insurance benefits

Expectations Met

Employee was not previously eligible but had a change in expectations and/or eligibility was met on the employee's 12-month anniversary or rolling lookback. Employee is **required** to participate.

Employer must provide applications for any ETF-administered insurance benefits