

Disability Retirement Program (40.63)

Employer Statement

How to Complete Form ET-5607

Upon receive of a Disability Retirement Program (40.63) Employer Statement (ET-5607) from the Department of Employee Trust Funds (ETF) (generally forwarded to you from UW System Human Resources), review the Application Information section and complete questions 1-6. The form should then be sent to the UW-Shared Services, Service Operations to complete the Employee Transaction Reporting section (Question 8). UW-Shared Services, Service Operations will return the completed form to you. ***When you receive the completed form back from UW-Shared Services, Service Operations, submit it to ETF and place a copy of the completed form in the employee's benefit file.***

ITEM #	DATA FIELD NAME	DESCRIPTION	INFORMATION FOUND
	Employee Name	Name of applicant	These fields are generally pre-populated when you receive the form. If they are not pre-populated, enter the requested information.
	Social Security #	Social Security # of applicant	
	Employee Address	Employee's address	
	ETF ID	Employee's ETF Member ID	
Center Section of Questions			
	QUESTION	MEANING	INFORMATION FOUND
1	Date employee last rendered services?	Last day employee was physically at work.	Confirm with department. Verify with timesheet in HRS.
2	a) Are there any earnings payable after the date last rendered services?	Did the employee receive any type of pay for dates after the last day they were physically at work? For example, did they use any paid leave after their last day physically at work?	Confirm with department. Review employee's paychecks - HRS: Review Paycheck . See KB 16882 – Review an Employee's Paycheck.
	b) If yes, identify the types of payments that extend the last day paid.	What types of paid leave did they use? Vacation, personal holiday, legal holiday, comp time, sick leave.	Review employee's leave history, timesheets and paychecks. <ul style="list-style-type: none"> Leave History – HRS: View Absence Balances and Absence Request History (Main Menu > Manager Self Service > Time Management > View Time > Search Absence Balance > Absence Balances) Timesheets – See KB 16508 – Accessing a Timesheet Paychecks - HRS: Review Paycheck. See KB 16882 – Review an Employee's Paycheck.
	c) Were any of these earnings paid out as a lump sum?	For disability purposes, lump sum payouts are considered reportable earnings. Must ensure that WRS deductions are taken from lump sum payouts. For disability purposes, employee must be paid out for all accumulated paid leave.	Review employee's paychecks - HRS: Review Paycheck . See KB 16882 – Review an Employee's Paycheck.

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3	Last day paid	<p>Last day for which employee will receive earnings (not always check date).</p> <p>If employee received lump sum payout for paid leave, must extend last day paid to account for leave that was paid out.</p>	<p>Confirm with department when the employee will be OFF payroll.</p> <p>Review employee's paychecks - HRS: Review Paycheck. See KB 16882 – Review an Employee's Paycheck.</p>
4	Is the employee expected to resume active service?	<p>Will the employee be coming back to work?</p> <p>The employee must have a termination date reported to the WRS. If not previously reported, include the termination information in the Employer section under Section A.</p>	<p>Confirm with department.</p> <p>Can be listed as "Unknown".</p>
5	Are (were) medical issues a contributing factor to why this employee ceased working? If no, explain.	<p>Did the employee stop working due to medical issues?</p> <p>If no, provide explanation.</p>	<p>Confirm with department as to reasons why employee ceased working.</p> <p>Review employee's job data, leave history and timesheets.</p> <ul style="list-style-type: none"> • Job Data - HRS: Job Data (Workforce Administration > Job Information > Job Data) • Leave History – HRS: View Absence Balances and Absence Request History (Main Menu > Manager Self Service > Time Management > View Time > Search Absence Balance > Absence Balances) • Timesheets – See KB 16508 – Accessing a Timesheet
6	Employee's Full-Time Equivalent (FTE) Percentage	<p>What is the employee's FTE?</p> <p>Note: If the employee reduced their FTE due to disability, indicate their FTE percentage prior to the reduction.</p>	<p>Review employee's Job Data - HRS: Job Data (Workforce Administration > Job Information > Job Data)</p>
7	If employee is an elected official, indicate the date of the end of the official's term of office.	N/A for UW System.	

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8	Employee Transaction Reporting	Send the form with the Application Information and Questions 1-6 completed to UW-Shared Services, Service Operations at serviceoperations@uwss.wisconsin.edu with the subject line: <i>Disability Employer Statement, Employee Name, Empl ID</i> . UW-Shared Services, Service Operations will complete question 8 and return the completed form to you to submit to ETF.	
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Institution: Submit completed form to ETF at ETFWEB@etf.wi.gov. Place a copy of the completed form in the employee's benefit file.

For questions completing the Disability Retirement Program (40.63) Employer Statement (ET-5607), contact uwshr@uwsa.edu.