

Rehired Annuitant Checklist

- Collect new direct deposit and W-4 forms as information could have changed.
- Check General Deductions to ensure none carried over from active employee position (i.e. Partners in Giving) if applicable.
- Check Additional Pay to ensure no add-ons or lump sum overloads carried over from active employee position if applicable.
- Check UW Tax-Sheltered Annuity (TSA) 403(b) Program and Wisconsin Deferred Compensation (WDC) 457 Program deductions to ensure they are not active (these are not always inactivated when the employee terminates / retires).

- **Employees who terminated employment on or after July 2, 2013 must stop their annuity and re-enroll in the WRS if their position qualifies.**
- **Employees who terminated employment prior to July 2, 2013 may elect whether or not to become an active WRS employee (if their position qualifies for the WRS).**

See the [Rehired Annuitant page](#) for eligibility rules.

- The [Rehired Annuitant Form \(ET-2319\)](#) must be completed within 7 days of returning to work (regardless of whether or not the position is WRS eligible at time of hire).
 - **Institution:** Complete the Employer section. Verify information in Employer section matches what will be or is in HRS.
 - **Employee:** Complete box 1 or box 2, signs/dates and returns to their human resources office within 7 days of returning to work.
 - **Institution:** For timely processing, **fax** the form (do not mail) to the Service Center at (608) 890-2194.
 - **Service Center:** Sign as WRS agent and submit to ETF.

Note: Institution HR office or Benefits Administrator is not a WRS agent.

1. If an employee retired **prior to July 2, 2013** and decides to continue annuity and NOT go back under the WRS **OR** employee is **not eligible** for the WRS initially:

- Make updates on UW Benefits Tab on Job Data (Workforce Administration > Job Information > UW Benefits). See [KB 18124](#) HR-View Employee Job Data Record in HRS for detailed information.
 - Previous WRS State and Local Service Fields—Enter “0” for both
 - WRS Before July 1, 2011 Field – Review the employee’s prior service in ETF One Net:
 - If WRS start date is **before** July 1, 2011, indicate “YES.”
 - If WRS start date is **on/after** July 1, 2011, indicate “NO.”
 - Rehired Annuitant Field – Select the appropriate value based on when the employee retired:
 - Retire **Post** July 1, 2013 no WRS
 - Retire **Pre** July 2, 2013 no WRS
- Rehired Annuitant is eligible for certain benefits and should be counseled on them: TSA, WDC, FSA, Leave Benefits (if position is leave-eligible).
- If position is not initially eligible for the WRS but later becomes eligible, employee must complete a new [Rehired Annuitant Form \(ET-2319\)](#) within 7 days of becoming WRS eligible (even if they do not want to go back under WRS).

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2. If employee decides to stop their annuity and go back under the WRS (either initially or after becoming eligible) **OR** employee must stop annuity and go back under the WRS because they retired **on or after** July 2, 2013:

- WRS coverage will be effective on the 1st of the month following ETF's receipt of the [Rehired Annuitant Form \(ET-2319\)](#). *The Rehired Annuitant Form receipt date at ETF determines the WRS effective date and all insurance benefits.* The employer and employee sections must be complete and the form must be signed by a WRS agent.

Rehired Annuitant becomes active employee on WRS coverage effective date (no longer considered a rehired annuitant).

- Make updates on UW Benefits Tab on Job Data (Workforce Administration > Job Information > UW Benefits). See [KB 18124](#) HR-View Employee Job Data Record in HRS for detailed information. *Update only after confirmation of the effective date is received from the UW Service Center, leave rehired annuitant as "No WRS" until confirmation is received.*
- Enter appropriate numbers for Previous WRS State and Local Service.
- WRS Before July 1, 2011 Field – Review the employee's prior service in ETF One Net:
- If WRS start date is **before** July 1, 2011, indicate "YES."
 - If WRS start date is **on/after** July 1, 2011, indicate "NO."
- Rehired Annuitant Field – Select the appropriate value based on when the employee retired:
- Retire **Post** July 1, 2013 elect WRS
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 - Retire **Pre** July 2, 2013 elect WRS
- Employee has new enrollment opportunities just as a new active employee would – benefit applications should be submitted with Rehired Annuitant Form (ET-2319). See Rehired Annuitant Form (ET-2319) for specific rules regarding State Group Health Insurance and State Group Life Insurance. Applications must be submitted within 30 days of the WRS coverage effective date.
- If position is leave-eligible, employee will earn leave. See UW System Administrative Policies which can be found on the [Leave Benefits](#) web site.
- Any unused certified sick leave credits will be saved by ETF until employee retires again (not available to employee during active employment).
- Any sick leave earned as a Rehired Annuitant will be converted and added to employee's saved sick leave credits when they retire again.

***Note: If the rehired annuitant value is not entered into the system immediately, the employee will be enrolled back into WRS even after the institution corrects the rehired annuitant value. A ticket will be required to correct the employee's eligibility.**

For more information, see: www.wisconsin.edu/ohrwd/benefits/empcha/ra