

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 web 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 UW-Shared Services, Service Operations at (608) 890-2194.
 - **UW-Shared Services, Service Operations:** 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 View Employee Job Data Record in HRS ([KB 18124](#)) 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 must be counseled on them: TSA, WDC, FSA, Leave Benefits (if position is leave-eligible).

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- 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).
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 View Employee Job Data Record in HRS ([KB 18124](#)) for detailed information. *Update only after confirmation of the effective date is received from UW-Shared Services, Service Operations, 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 must 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 pages](#).
- 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