Wisconsin Retirement Testing Preparation

The Wisconsin Retirement System (WRS) is changing its reporting requirements from annual to every pay period starting January 1, 2018. With that, there are many changes in the information and the format of the reporting. As a result, all Wisconsin municipalities that participate in WRS are required to submit test files for approval prior to September 15, 2017. We would like to assist those clients with the approval process. Before that can happen, however, there are several items that need to be setup and steps that need to be taken before the test files can be submitted. Below is a list of those steps that need to be completed. Once these steps are completed, please call Amber (888.241.1517) to setup a time for one of our team members to call you and work with you to submit the test files.

Summarized Steps

Briefly, the following are the steps that need to be completed. More detailed instructions follow.

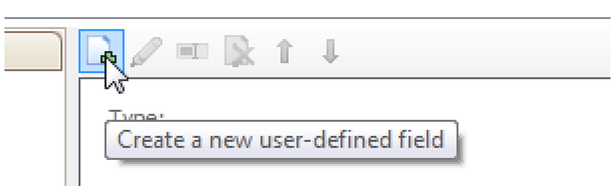
1. Watch the File Upload webinar on the Employee Trust Funds (ETF) website. All municipalities must watch this 1 ½ hour video before they can utilize their login to the test website.
2. Create several user-defined fields in Payroll.
3. Identify and setup five (5) employees to test. Ensure that all information is complete for those employees.
4. Call Civic to setup an appointment for one of our Support Analysts to call you to assist in setting up and submitting the test files.

Detailed Steps

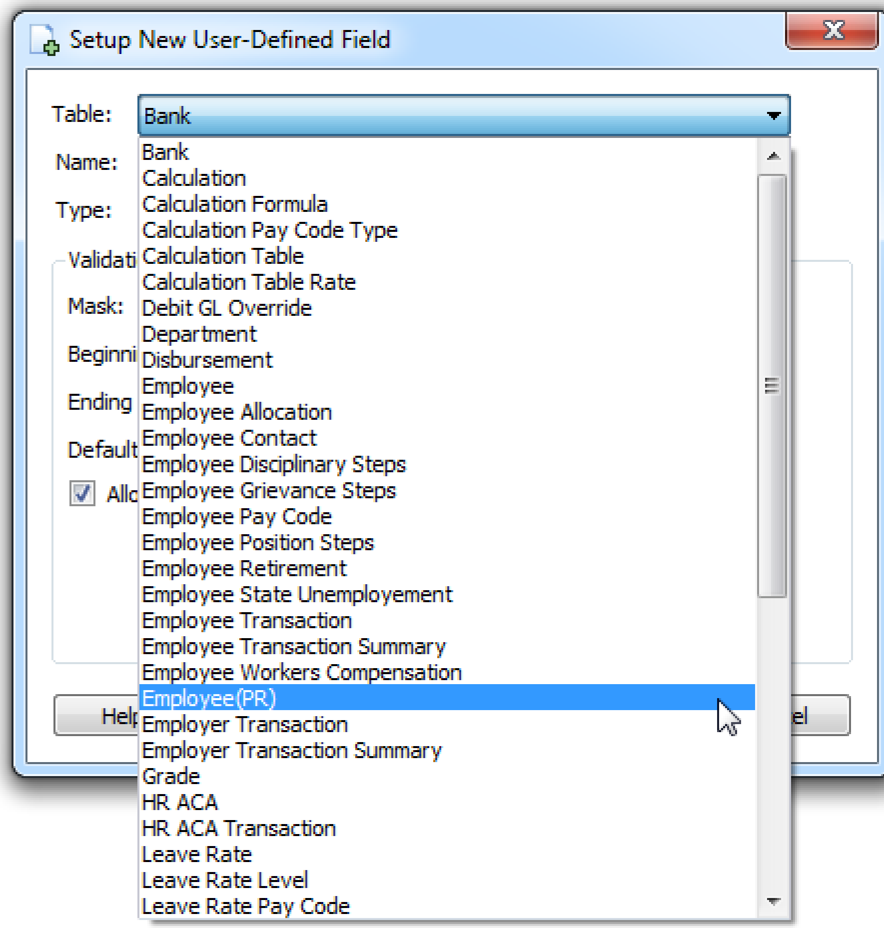
The following are detailed instructions on how to complete these steps:

1. You will need to watch the File Upload webinar on the ETF website. All municipalities must watch this 1 ½ hour video before they can utilize their login to the test website. To view the video, visit the ETF website by clicking **here**. You need to watch the **View the Recorded Confirmation – File Upload Webinar**. Typically, login credentials to submit test files will be active one (1) business day after watching the video.

2. Create the following user-defined fields in the **Payroll** module: **WRS Begin Date**, **WRS Status**, **WRS Coverage Date**, **Empl Status Change**, and **WRS Cycle**. To create these fields, follow these steps:
    a. In **Payroll**, go to **Organization | Organization**.
    b. Click on the **User-Defined** tab.
    c. Click on the **Create a new user-defined field** button on the right.

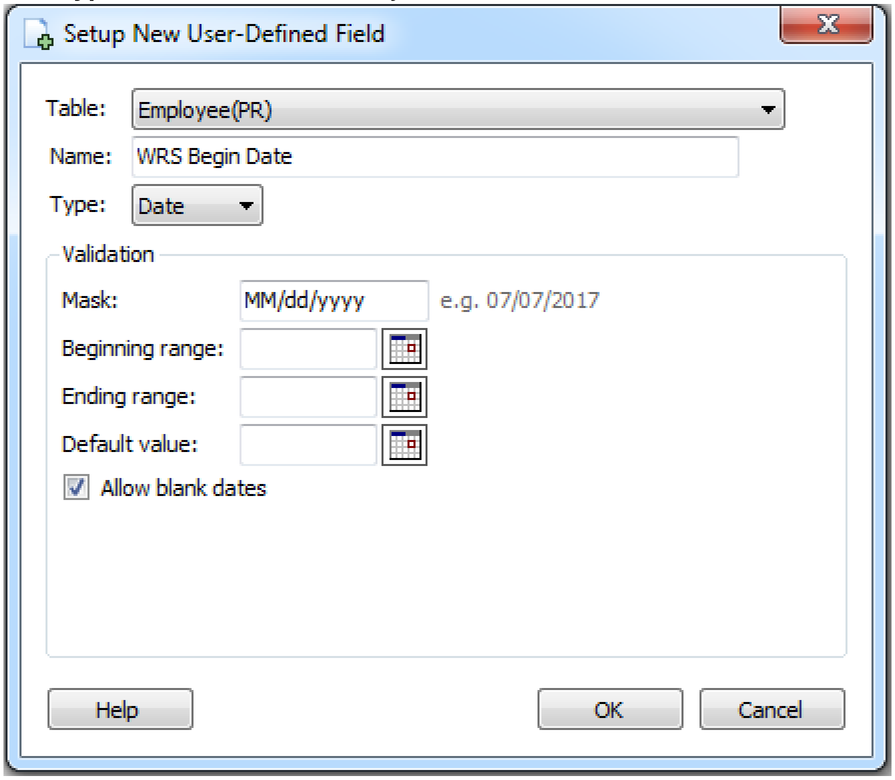


d. Select **Employee(PR)** from the drop-down. **Note:** Do not select **Employee**. It needs to be **Employee(PR)**.



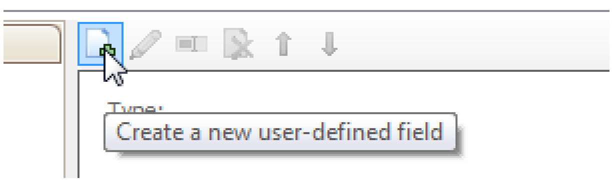
e. Type “WRS Begin Date” in the **Name** field.

f. The **Type** needs to be **Date** and you can leave **Allow blank dates** to be checked.

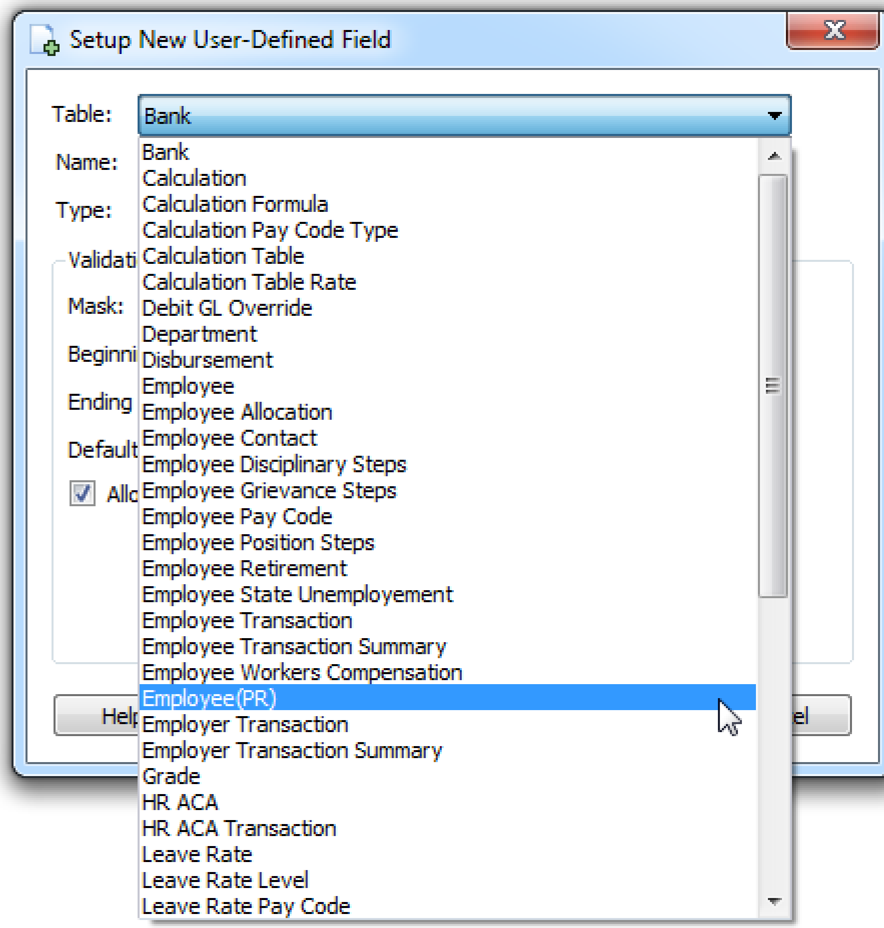


g. Click **OK**.

h. Click on the **Create a new user-defined field** button on the right.

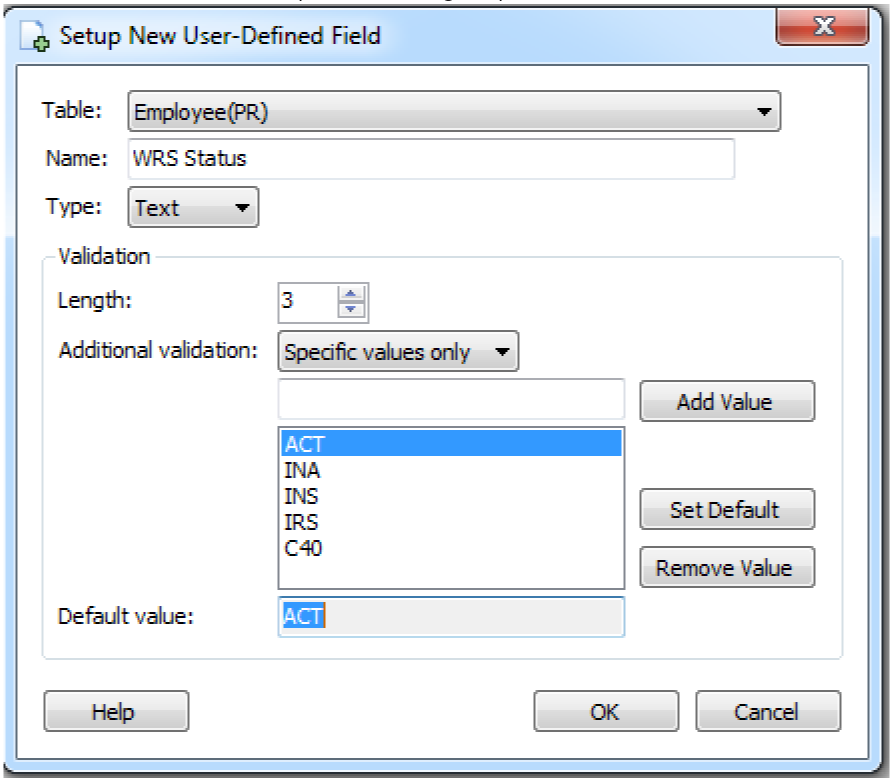


i. Select **Employee(PR)** from the drop-down. **Note:** Do not select **Employee**. It needs to be **Employee(PR)**.



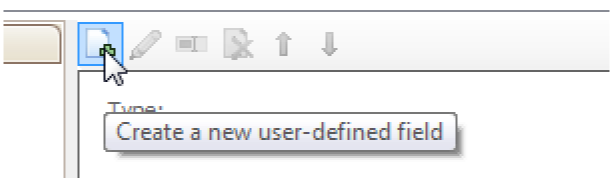
j. Type “WRS Status” in the **Name** field.
k. The **Type** needs to be **Text** and the **Length** should be **3** characters.
l. Change the **Additional validation** to **Specific values only**.
m. In the field directly below **Specific values only**, type “ACT”. Click **Add Value** to add the value to the list.
n. In that same field, type “INA”. Click **Add Value** to add the value to the list.
o. In that same field, type “INS”. Click **Add Value** to add the value to the list.
p. In that same field, type “IRS”. Click **Add Value** to add the value to the list.
q. In that same field, type “C40”. Click **Add Value** to add the value to the list.

r. You should leave "ACT" (i.e. WRS eligible) as the **Default value**.

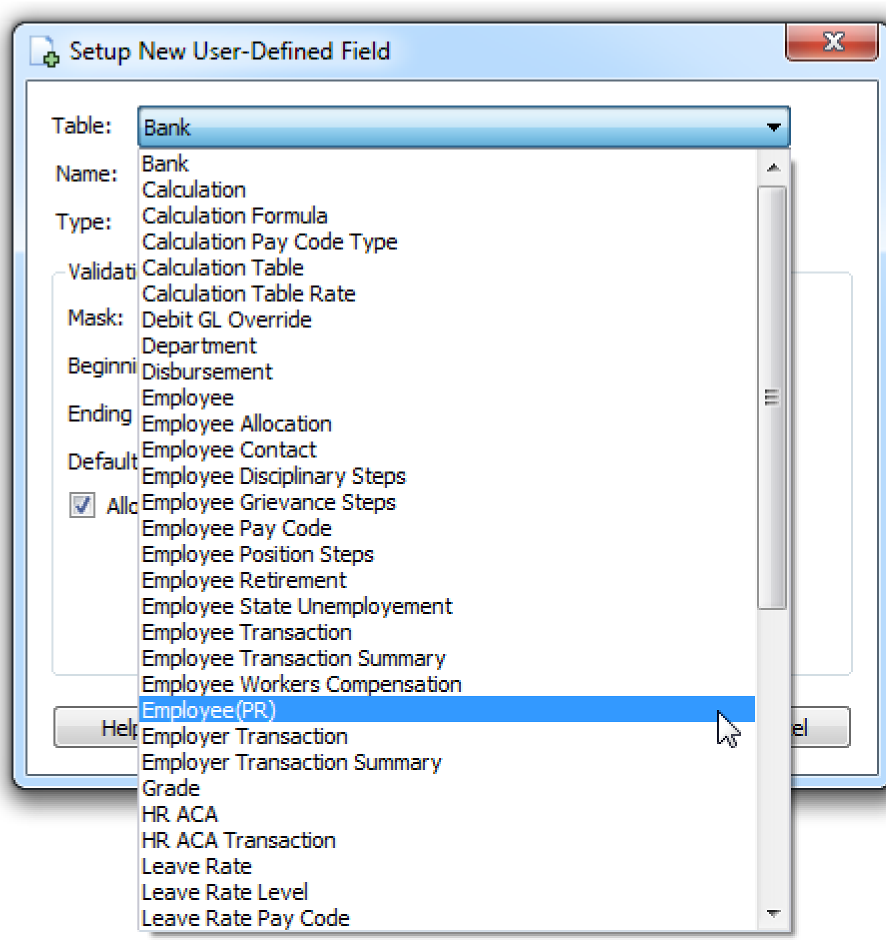


s. Click **OK**.

t. Click on the **Create a new user-defined field** button on the right.

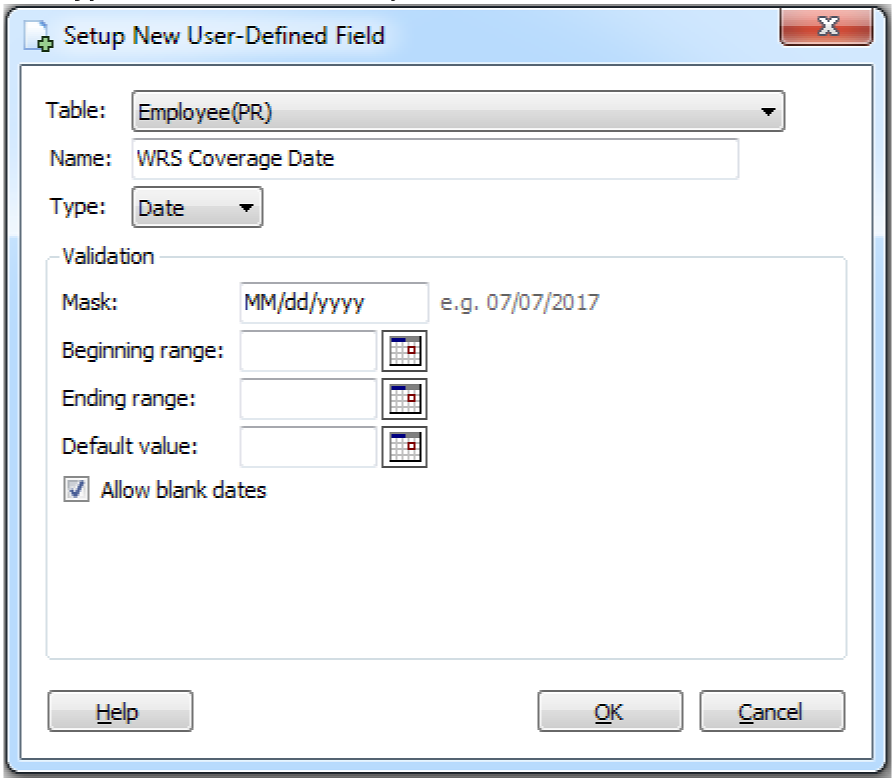


u. Select **Employee(PR)** from the drop-down. **Note:** Do not select **Employee**. It needs to be **Employee(PR)**.



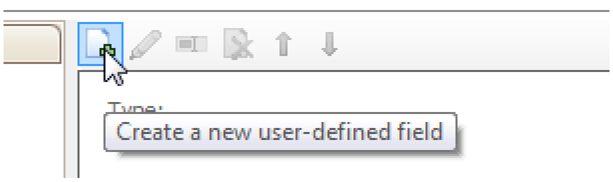
v. Type “WRS Coverage Date” in the **Name** field.

w. The **Type** needs to be **Date** and you can leave **Allow blank dates** to be checked.

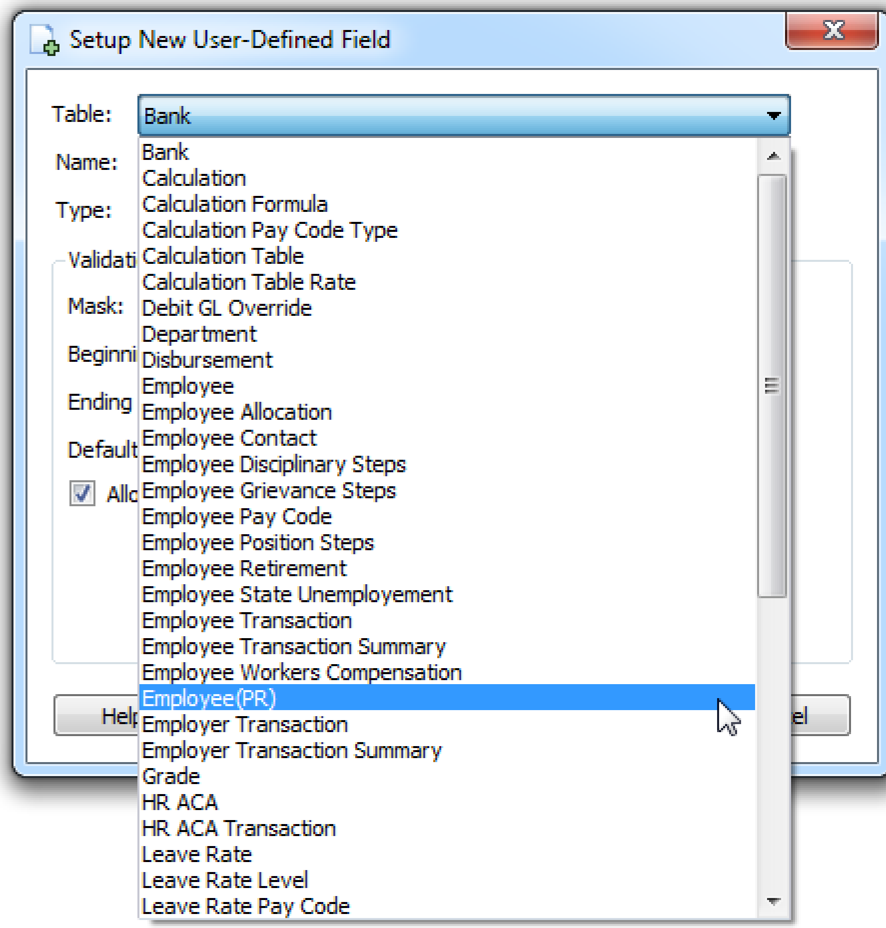


x. Click **OK**.

y. Click on the **Create a new user-defined field** button on the right.



z. Select **Employee(PR)** from the drop-down. **Note:** Do not select **Employee**. It needs to be **Employee(PR)**.



aa. Type “Empl Status Change” in the **Name** field.

bb. The **Type** needs to be **Text** and the **Length** should be **2** characters.

cc. Change the **Additional validation** to **Specific values only**.

dd. In the field directly below **Specific values only**, type “AE”. Click **Add Value** to add the value to the list.

ee. In that same field, type “OE”. Click **Add Value** to add the value to the list.

ff. In that same field, type “PC”. Click **Add Value** to add the value to the list.

gg. In that same field, type “PF”. Click **Add Value** to add the value to the list.

hh. In that same field, type “PM”. Click **Add Value** to add the value to the list.

ii. In that same field, type “PU”. Click **Add Value** to add the value to the list.

jj. In that same field, type “PW”. Click **Add Value** to add the value to the list.

kk. In that same field, type “TC”. Click **Add Value** to add the value to the list.

ll. In that same field, type “UC”. Click **Add Value** to add the value to the list.

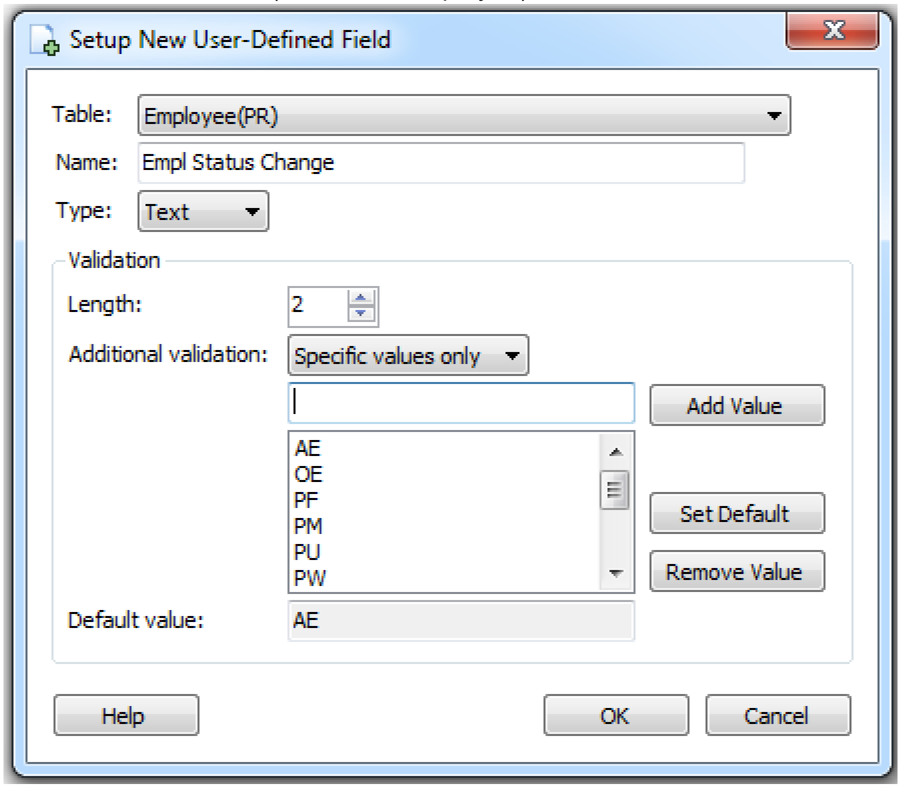
mm. In that same field, type “UF”. Click **Add Value** to add the value to the list.

nn. In that same field, type “UL”. Click **Add Value** to add the value to the list.

oo. In that same field, type “UM”. Click **Add Value** to add the value to the list.

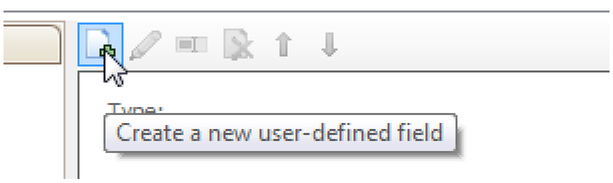
pp. In that same field, type “UU”. Click **Add Value** to add the value to the list.

qq. You shoud leave “AE” (i.e. Active Employee) as the **Default value**.

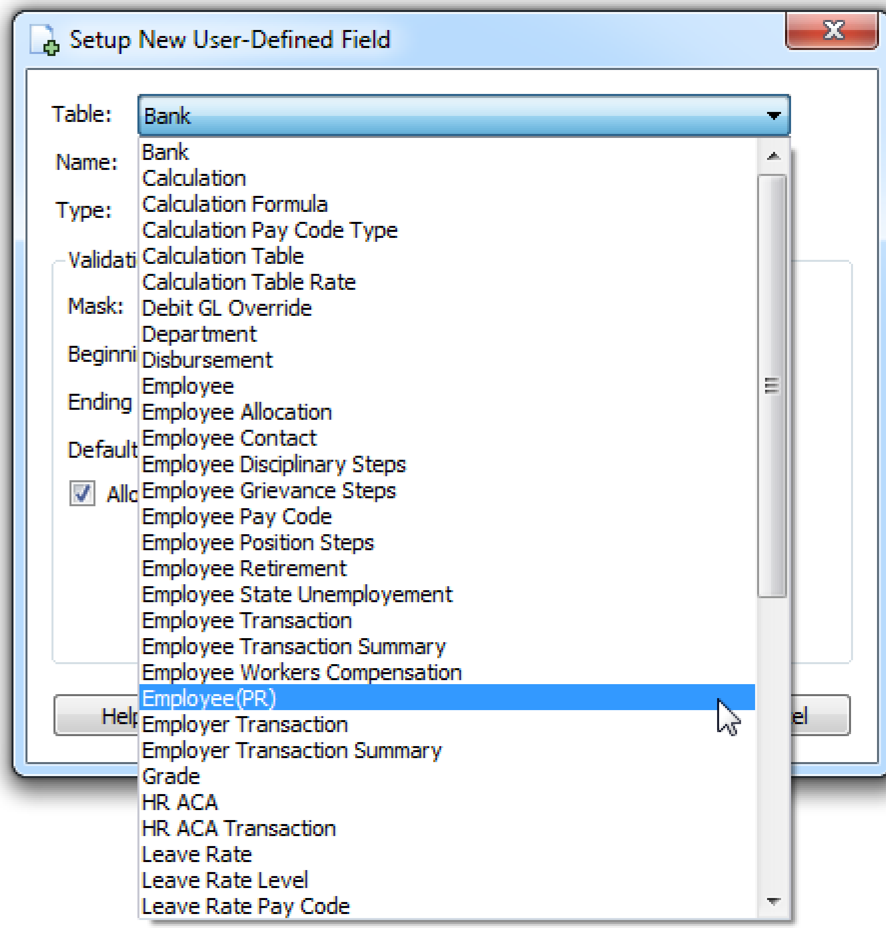


rr. Click **OK**.

ss. Click on the **Create a new user-defined field** button on the right.



tt. Select **Employee(PR)** from the drop-down. **Note:** Do not select **Employee**. It needs to be **Employee(PR)**.



uu. Type “WRS Cycle” in the **Name** field.

vv. The **Type** needs to be **Text** and the **Length** should be **3** characters.

ww. Change the **Additional validation** to **Specific values only**.

xx. In the field directly below **Specific values only**, type “B00” (these are zeros after the “B” and not letters). Click **Add Value** to add the value to the list.

yy. In that same field, type “M00” (these are zeros after the “M” and not letters). Click **Add Value** to add the value to the list.

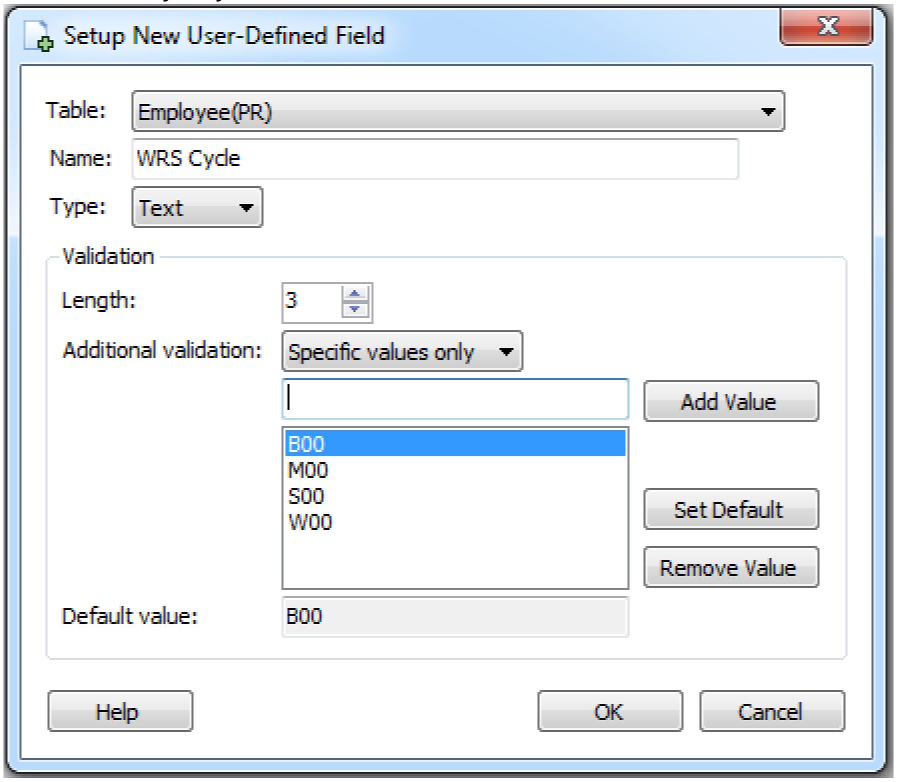
zz. In that same field, type “S00” (these are zeros after the “M” and not letters). Click **Add Value** to add the value to the list.

aaa. In that same field, type “W00” (these are zeros after the “M” and not letters). Click **Add Value** to add the value to the list.

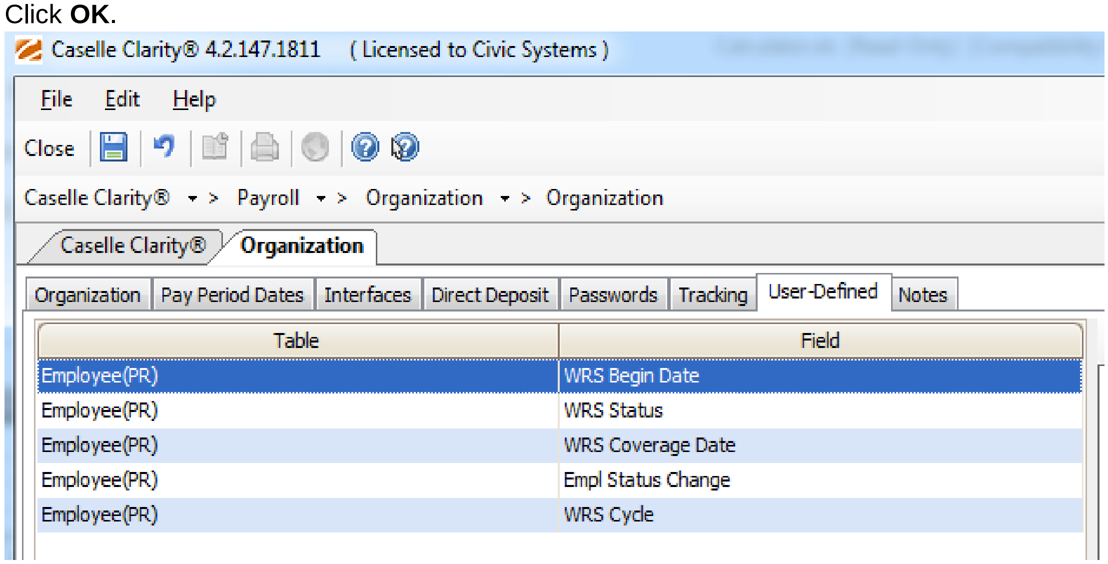
bbb. You should specify the corect **Default value**. Click on the appropriate value in the list and click the **Set Default** button. Setting the default should be based on the following:

- B00 – Bi-Weekly Payroll
- M00 – Monthly Payroll
- S00 – Semi-Monthly Payroll

- W00 – Weekly Payroll



ccc. Click **OK**.



3. We are going to use five (5) employees to test. Please select those five (5) employees. You will then need to make sure the following information is complete on those five (5) employees. In **Payroll**, go to **Employees | Modify Existing Employees** and verify or complete the following information:
    a. **Name** – *Employee tab*
    b. **Address line 1 –** *Employee tab*
    c. **City –** *Employee tab*
    d. **State –** *Employee tab*
    e. **Zip/Postal code –** *Employee tab*

f. **Telephone 1 –** not required **–** *Employee tab*
g. **Email** – not required **–** *Employee tab*
h. **Social Security number –** *Employee tab*
i. **Birth date –** *Employee tab*
j. **Gender –** *Employee tab*
k. **Annual wage –** *Wage tab*
l. **Hire date –** *Job tab*
m. **Retirement class** – common classes include 30 (general), 33 (protective with social security), 34 (protective without social security), and 49 (elected position) – *Job tab, Retirement sub-tab*
n. **WRS Begin Date** – *User-Defined tab*
o. **WRS Status** – *User-Defined tab*
p. **WRS Coverage Date** – *User-Defined tab*
q. **Empl Status Change** – *User-Defined tab*
r. **WRS Cycle** – *User-Defined tab*

4. Once steps 1 -3 are complete, call Amber (888.241.1517) to setup an appointment with one of our Support Analysts to assist you with setup and submitting your test files.

   Please Note: Civic support will not be available September 14-15, 2017 due to our annual **Civic Symposium** in Wisconsin Dells, WI.