

Wisconsin Retirement System (WRS) Reporting Guide

new world ERP – Human Resources: State Requirements



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Contents

Permissions	1
Validation Sets	
User-Defined Fields	
System Settings Maintenance	
Company Settings	
WRS Settings	
Wisconsin Retirement List	
Create Data	
Member Data	
Payroll Data	
Employment Data	
Wages Data	
Contributions Data	
Print Reports and Transmittal	
Sample Report and Transmittal Outputs	
Wisconsin Retirement Listing Summary	
Wisconsin Retirement Listing Detail	
Wisconsin Retirement Transmittal	
Wisconsin Retirement Transmittal Frrors	



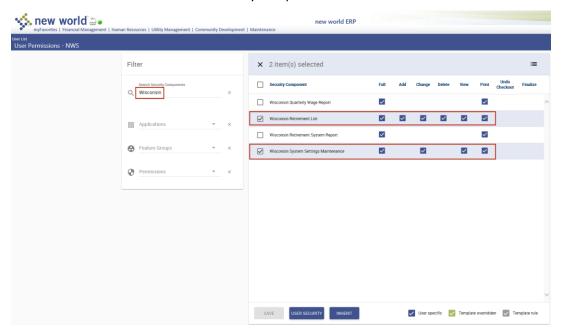
INTRODUCTION

This guide provides instructions for the setup and creation of Wisconsin Retirement System (WRS) files.

PERMISSIONS

Users need permission to two security components, *Wisconsin Retirement List* and *Wisconsin System Settings Maintenance*:

- 1. Navigate to Maintenance > new world ERP Suite > Security > Users. The User List page opens.
- 2. Use the filter in the *User Name* column to search for the user.
- 3. Select the user's row.
- 4. Click **Permissions**. The User Permissions page opens, containing a grid of security components and a filter panel.
- 5. In the *Search Security Components* filter, type *Wisconsin* (the entry is not case sensitive). The grid reloads to contain the Wisconsin security components:



- 6. Select Full permissions for the Wisconsin Retirement List component.
- 7. Select Full permissions for the Wisconsin System Settings Maintenance component.
- 8. Click Save.
- 9. For the permissions to take effect, the user must log off and log back onto the system.



VALIDATION SETS

Set Number	Name
588	Wisconsin WRS Report Cycle Type
590	Wisconsin WRS Employment Status Change
591	Wisconsin WRS Wage Hours Type
592	Wisconsin WRS Contribution Type
593	Wisconsin WRS Program Type
594	Wisconsin WRS Job Category Type
595	Wisconsin WRS Work Status Type

USER-DEFINED FIELDS

Record Type	Name	Data Type
Employee Employment	WRS Job Category	Validation Set 594
Employee Employment	WRS Work Status	Validation Set 595

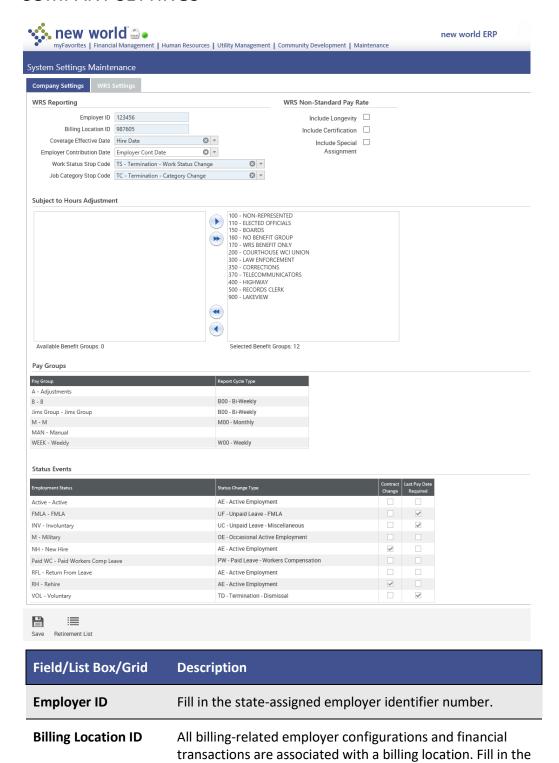
SYSTEM SETTINGS MAINTENANCE

To create your state retirement data, you need to perform additional setup on the new System Settings Maintenance page. The setup includes employer information, benefit groups subject to hours adjustment, pay groups, status events, wage settings and the mapping of deduction and benefit codes to contribution and program types.

Navigate to **Human Resources > State Requirements > WI > System Settings Maintenance**. The System Settings Maintenance page opens. This page contains two tabs: **Company Settings** and **WRS Settings**:



COMPANY SETTINGS



state-assigned employer billing location.



Field/List Box/Grid	Description
Coverage Effective Date	Select the date employees became eligible for WRS coverage. Available selections may include <i>Accrual Date</i> , <i>Benefit Date</i> , <i>Hire Date</i> or any user-defined date you want to set up.
	A <i>Coverage Effective Date</i> is required before you can save your selections on the System Settings Maintenance page.
Employer Contribution Date	You may use this field to supply the date the employer began contributing to the cost of an employee medical plan. Available selections may include <i>Accrual Date</i> , <i>Benefit Date</i> , <i>Hire Date</i> , <i>Seniority Date</i> or any Employee Employment user-defined date you want to set up.
	If the selected date is populated at the employee level, it will be the date used to report when the employer began contributing to the employee medical plan. If the date is not populated at the employee level, it will be assumed the employer does not contribute to the employee medical plan, and a date will not be reported.
Work Status Stop Code	An employee's employment status needs to indicate changes in work status, and the changes need to be reported to the WRS. Select a code identifying work status changes. The available selections come from validation set 590-Wisconsin WRS Employment Status Change.
	This field is linked to the WRS Work Status UDF on the Workforce Administration Employment tab. If the entry in an employee's WRS Work Status UDF changes, an employment status event for the Work Status Stop Code selected is created automatically.
	Example: A Work Status Stop Code of TS identifies a work status termination. If an employee's WRS Work Status changes from active to inactive, a record with TS is created to indicate the terminated active status, and another record is created to indicate the current inactive status.



Field/List Box/Grid	Description
Job Category Stop Code	Select a code identifying job category changes affecting employment status. The available selections come from validation set 590-Wisconsin WRS Employment Status Change .
	This field is linked to the WRS Job Category UDF on the Workforce Administration Employment tab. If the entry in an employee's WRS Job Category UDF changes, an employment status event for the Job Category Stop Code selected is created automatically.
	Example: A Job Category Stop Code of TC identifies a job category termination. If an employee's WRS Job Category changes from General (30) to Teacher (31), a record with TC is created to indicate the terminated category 30 , and another record is created to indicate the current category 31 .
WRS Non-Standard Pay Rate	This section provides check boxes for including longevity, certification and special assignment pay with the base pay rate. The gross is divided by the base pay to come up with reportable hours. Results will vary based on which check boxes are selected. Leave all boxes unchecked to use the minimum base pay from Workforce Administration.
Subject to Hours Adjustment	To adjust hours reported to the WRS in accordance with regulations for full-time employees who work other than eight-hour days, select the benefit groups that are subject to hours adjustment. For benefit groups not selected, actual hours worked are reported.
Pay Groups	To submit WRS information specific to the pay group frequencies being reported, map your pay groups to the appropriate report cycle type codes. Report cycle types identify the number of overlapping days between multiple bi-weekly or monthly pay groups. The available cycle type codes come from validation set 10-Pay Group .



Field/List Box/Grid	Description
Status Events	Changes to an employee's employment status are required to be reported. Use the Status Events grid to map your current employment status events to status change types the WRS has pre-defined as reportable. The <i>Status Change Type</i> column contains values from validation set 590-Wisconsin WRS Employment Status Change .
	If a status change involves a contract change with the WRS, select the check box in the <i>Contract Change</i> column. Any category change, work status change or new employee record involves a contract change, so selecting this box determines whether the <i>WRS Original Hire Date</i> , <i>WRS Begin Date</i> or <i>WRS Coverage Effective Date</i> is populated.
	Select the check box in the Last Pay Date Required column if a status change moves an employee out of a "paid" status. The employee is not terminated but is employed without pay for a period—for example, unpaid FMLA or workers' compensation. When an employee moves to an unpaid status, WRS requires a status event change last pay date to be reported. Terminated employees will have this date populated with the termination date automatically.

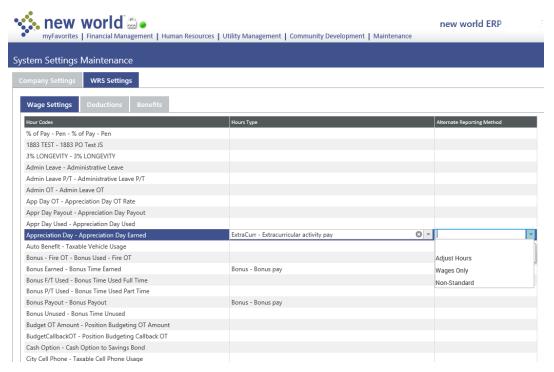
Note: To navigate back and forth from this page to the Wisconsin Retirement List page while performing setup and running reports, use the **Retirement List** button on this page and the **Settings** button on the Wisconsin Retirement List page.

WRS SETTINGS

The WRS Settings tab contains three tabs: Wage Settings, Deductions and Benefits.

The grid on the **Wage Settings** tab contains all hours codes and associated hours type codes that are used for wage reporting:



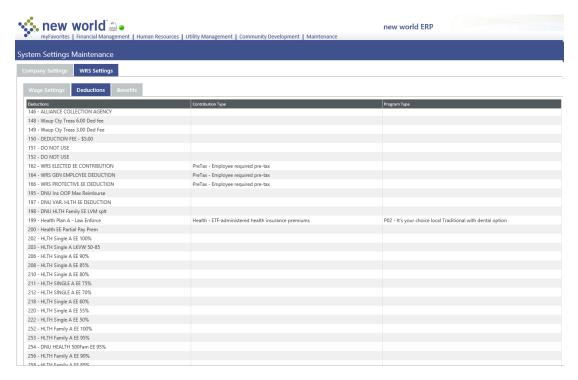


Map each hours code to the appropriate hours type. If you want an hours code and type to be subject to hours adjustment, wages only or non-standard compensation converted into reportable hours, select the appropriate entry in the *Alternate Reporting Method* column.

Note: An Alternate Reporting Method requires a corresponding Hours Type.

The grid on the **Deductions** tab contains all deduction codes and associated contribution and program type codes:

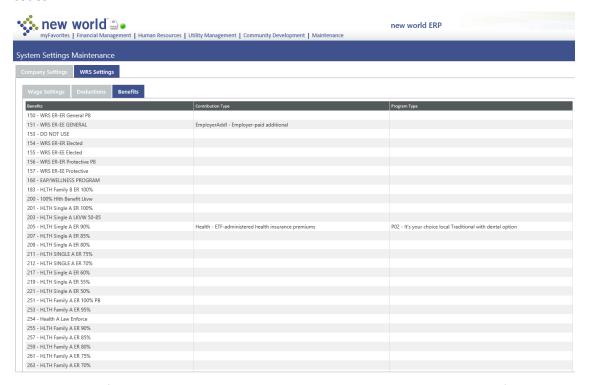




Map each deduction to the appropriate contribution type. Available selections come from validation set 592 (Wisconsin WRS Contribution Type). If the contribution is administered by the ETF, select the program type, also.



The grid on the **Benefits** tab contains all benefit codes and associated contribution and program type codes:



Map each benefit to the appropriate contribution type. Available selections come from validation set 592 (Wisconsin WRS Contribution Type). If the contribution is administered by the ETF, select the program type, also.

WISCONSIN RETIREMENT LIST

Once you have completed the setup, you are ready to create an on-screen work file of the wage and contribution data that are available for the Wisconsin Retirement Listing. This data may be reviewed and modified before it is transmitted to the state.

CREATE DATA

1. Navigate to Human Resources > State Requirements > WI > Retirement List. The Wisconsin Retirement List page opens:







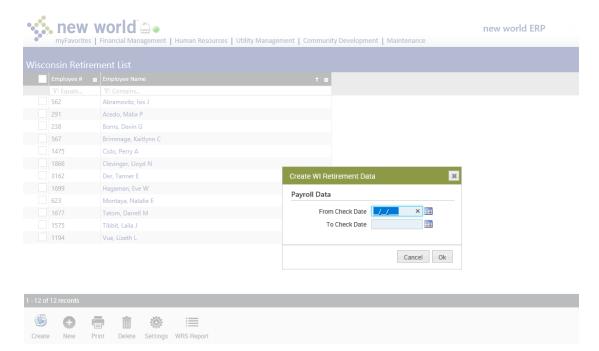
The grid on this page contains retirement data from the last time the work file was created, with each row in the grid corresponding to an employee record. If you are running this process for the first time, the grid will be empty.

Note: The Wisconsin Retirement List replaces the original Wisconsin Retirement System Report; however, if you need to run the original version of the report, click the **WRS Report** button at the bottom of the page.

Note: To navigate back and forth from this page to the System Settings Maintenance page while performing setup and running reports, use the **Settings** button on this page and the **Retirement List** button on the System Settings Maintenance page.

2. Click the Create button. The Create WI Retirement Data dialog opens:





3. Select the *From Check Date* and *To Check Date* of the date range to be reported. The create process will use the pay batch(es) within this timeframe to generate WRS data.

Note: Run the create process for one pay period at a time.

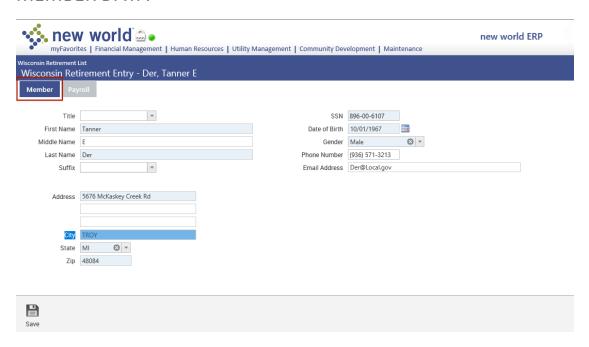
4. Click **OK**. Employee data for the check date range selected populates the grid on the Wisconsin Retirement List page.

To remove an employee from the list, select the check box to the left of the employee's name, and click the **Delete** button.

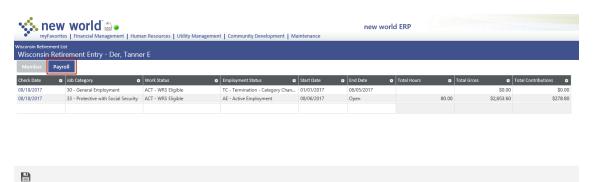
Each employee name is a hyperlink to the Wisconsin Retirement Entry page containing the employee's demographic and payroll data, all of which you may edit, on separate **Member** and **Payroll** tabs:



MEMBER DATA



PAYROLL DATA

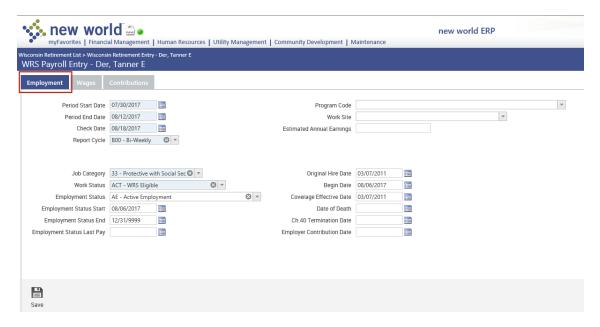


The grid on the **Payroll** tab contains the number of records being reported for an employee. If an employee's benefit group is selected as *Subject to Hours Adjustment* in Wisconsin System Settings Maintenance, the grid will include an *Adjusted Hours* column.

To add a WRS member record and update employment status or allocate wages not processed through payroll, click the **New** button at the bottom of the Wisconsin Retirement List page. To view or edit payroll data, click the hyperlinked *Check Date*. In either instance, the WRS Payroll Entry page will open, containing three tabs of data: **Employment**, **Wages** and **Contributions**. This page contains all available data; the transmittal file, however, will contain only the data that has changed and is required to be reported:



EMPLOYMENT DATA



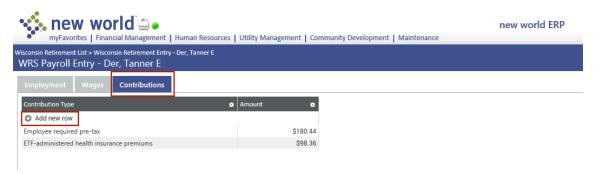
WAGES DATA



The **Wages** tab contains the hours type, hours, adjusted hours (if applicable) and amount for each WRS record.



CONTRIBUTIONS DATA



To add data to the **Wages** or **Contributions** tab, click the **Add new row** button at the top of the grid. Contributions are listed by contribution type. Contribution types come from validation set 592 (Wisconsin WRS Contribution Type). Amounts are calculated according to the mapping of contribution codes to deductions and benefits in System Settings Maintenance.

PRINT REPORTS AND TRANSMITTAL

To generate the Wisconsin Retirement Listing, transmittal file and transmittal errors report, click the **Print** button at the bottom of the Wisconsin Retirement List page. A dialog appears with multiple report output options:



Select the type of data you want to see.

In the *Report Type* field, select whether you want a *Detail* or *Summary* listing. Select the check boxes next to the types of data you want to include on the listing. The options are *Member*, *Employment*, *Wages* and *Contributions*. Click **OK**.

The Wisconsin Retirement Listing, Wisconsin Retirement Transmittal File and Wisconsin Retirement Transmittal Errors report are generated and sent to *myReports*. The error report identifies what data is missing or invalid so that you may fix it in new world ERP and re-run the listing.



SAMPLE REPORT AND TRANSMITTAL OUTPUTS

WISCONSIN RETIREMENT LISTING SUMMARY



Wisconsin Retirement Transmittal File

Report Type - Summary

loyee					Posted Hours	Adjusted Hours	Wages	Contributions	
562 Abramovitz, Isis J					80.0000	80.0000	2,112.80	343.67	
Member Information									
-		564-00-6253			Address	6610 Cox St			
	Date of Birth					TROY MI 48084			
	Gender	Male (936) 571-3213							
	THORE NUMBER	(300) 371 3213			Email Address	Abramovitz@Local.go	,		
Employment									
Check Date		Job Category	Work Status	Status		Posted Hours	Adjusted Hours	Wages	Contribution
08/18/2017		30	ACT	UF		80.0000	80.0000	2,112.80	343.6
291 Acedo, Malia P					80.0000	80.0000	1,964.80	233.61	
Member Information									
		582-00-3230				6538 Wells St			
		01/21/1970				TROY MI 48084			
		Female (936) 571-3213							
	THORE NUMBER	(550) 571 5215			Email Address	Acedo@Local.gov			
Employment									
Check Date		Job Category	Work Status	Status		Posted Hours	Adjusted Hours	Wages	Contribution
08/18/2017		33	ACT	AE		80.0000	80.0000	1,964.80	233.6
238 Borns, Devin G					72.5000	80.0000	2,135.85	145.24	
Member Information									
		270-00-0088				6375 Arbors Way			
		01/20/1960 Female				TROY MI 48084			
		(936) 571-3213							
		(,			Email Address	Borns@Local.gov			
Employment									
Check Date		Job Category	Work Status	Status		Posted Hours	Adjusted Hours	Wages	Contribution
08/18/2017		30	ACT	AE		72.5000	80.0000	2,135.85	145.2
567 Brimmage, Kaitlynn (:				80.0000	80.0000	2,303.20	364.98	
Member Information									

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WISCONSIN RETIREMENT LISTING DETAIL



Wisconsin Retirement Transmittal File

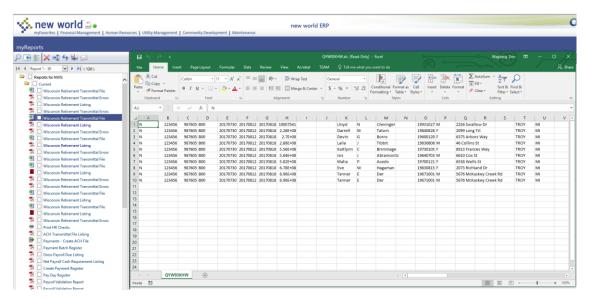
Report Type - Detail

nployee		Posted Hours	Adjusted Hours	Wages
562 Abramovitz, Isis J		80.0000	80.0000	2,112.80
Wages				
Туре	Posted Hours	Adjusted Hours	Wages	Check Date
Regular wages	80.0000	80.0000	2,112.80	08/18/2017
_	80.0000	80.0000	2,112.80	
291 Acedo, Malia P		80.0000	80.0000	1,964.80
Wages				
Type	Posted Hours	Adjusted Hours	Wages	Check Date
Regular wages	80.0000	80.0000	1,964.80	08/18/2017
_	80.0000	80.0000	1,964.80	
238 Borns, Devin G		72,5000	80.0000	2,135.85
Wages				
Туре	Posted Hours	Adjusted Hours	Wages	Check Date
Regular wages	72.5000	80.0000	2,135.85	08/18/2017
	72.5000	80.0000	2,135.85	
567 Brimmage, Kaitlynn C		80.0000	80.0000	2,303.20
Wages				
Туре	Posted Hours	Adjusted Hours	Wages	Check Date
Regular wages	80.0000	80.0000	2,303.20	08/18/2017
_	80.0000	80.0000	2,303.20	
1866 Clevinger, Lloyd N		80.0000	80.0000	1,700.80
Wages				
Туре	Posted Hours	Adjusted Hours	Wages	Check Date
Regular wages	80.0000	80.0000	1,700.80	08/18/2017
_	80.0000	80.0000	1,700.80	
3162 Der, Tanner E		80.0000	80.0000	2,653.60
Wages				
Туре	Posted Hours	Adjusted Hours	Wages	Check Date
Regular wages	80.0000	80.0000	2,653.60	08/18/2017

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WISCONSIN RETIREMENT TRANSMITTAL



Use the transmittal file to upload WRS data directly to the ETF website.

WISCONSIN RETIREMENT TRANSMITTAL ERRORS



