

Chapter Ret 5

APPLICATIONS

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Ret 5.01 Application schedule. The following schedule is adopted for the administration of the system:

(1) SEPARATION BENEFITS.

(a) Each application for a separation benefit shall be acted upon by the executive director and actuary pursuant to section 66.912 (1) (b), Wis. Stats., if it, and all other necessary forms and data, have been received in the office of the fund in conformity with the following schedule:

(b) The deadlines for the receipt of applications for separation benefits which shall be paid pursuant to (c) shall be at the close of business on:

March -----	20	September -----	20
June -----	20	December -----	20

(c) Not later than the following dates the fund will deliver separation benefit payrolls to the director of budget and accounts covering separation benefits applied for by the last preceding deadline established under (b) hereof:

March -----	20	September -----	20
June -----	20	December -----	20

(d) Separation benefit payrolls shall include amounts due each person from whom an application has been received not later than the application deadline prior thereto, and which has been approved pursuant to section 66.912 (1) (b), Wis. Stats., provided that the payroll report containing final earnings for that person has been received by the fund not more than 30 days after the application deadline.

(2) QUARTERLY SCHEDULE. No application for a disability annuity will be considered and passed upon by the board of trustees unless such application and all required accompanying forms and data have been on file in the office of the fund not later than the following date preceding the board meeting:

February -----	20	August -----	20
May -----	20	November -----	20

(3) MONTHLY SCHEDULE. Applications for retirement and beneficiary annuities, and death benefits shall be processed and paid as of the end of each month upon the approval of the executive director

and the actuary, provided that no such annuity shall be continued beyond the date of the next meeting of the board without the approval of the board, if each such application and all required accompanying forms and data have been on file in the office of the fund not later than the 20th day of the preceding month.

History: 1-2-56; am. (1) (a), (b), (c), (d), Register, October, 1956, No. 10, eff. 12-31-56; am. (2) and cr. (3), Register, November, 1957, No. 23, eff. 12-31-57.

Ret 5.11 Termination prerequisite. No application for a retirement annuity may be filed until the participating employe has terminated all employment for which normal contributions are required.

Ret 5.12 Application withdrawal. Any application may be withdrawn by the applicant at any time before approval by the board by written notice to the board in which event such application shall have no force and effect. In such instances any subsequent application shall be treated as a new application.

Ret 5.13 Birth date. Each application for a retirement, beneficiary, or disability annuity must be accompanied by a certified copy of a birth certificate or a certified copy of a judgment entered and recorded pursuant to section 327.28, Wis. Stats., or other evidence of date of birth acceptable to the fund unless previously submitted.

Ret 5.14 Beneficiary designation. Each application for a retirement, beneficiary, or disability annuity must be accompanied by a designation of beneficiary (Form 2).

Ret 5.21 Eligibility. Where potential prior service credits are involved, a participating employe can establish eligibility for a retirement or disability annuity, or for a death benefit only if his name appears on a monthly payroll report to the fund as having earned some compensation from the municipality granting the prior service credit after the effective date of participation by such municipality.

Ret 5.31 Death of applicant. When an applicant for any annuity or benefit except as otherwise provided under section 66.906 (3), Wis. Stats., dies before action thereon, but such annuity or benefit is approved because information as to the death of the applicant has not been received, the approval of the annuity or benefit shall be automatically nullified.

Ret 5.32 Estates. When the applicant for a death benefit is the personal representative of the estate of the deceased, the board can approve the application, but actual payment of the death benefit will be withheld by the executive director until the necessary legal documents have been submitted by the executor or administrator and such have been approved by the legal advisor.

Ret 5.41 Disability qualification. (1) In the case of an application for a disability annuity the executive director shall obtain a medical certification as to total and permanent disability as set forth in (4) and (5) from the applicant's attending physician and from the municipal physician, or if there be no municipal physician then from the municipal health officer if he is a licensed physician. If the executive

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director cannot obtain such certification from a municipal physician or health officer, then he shall request such certification from a physician he believes will be approved by the board.

(2) It shall be the responsibility of the participating municipality and the participating employe to furnish and pay for the certifications required.

(3) The executive director is authorized to require and to spend such sum as is necessary for a medical examination pursuant to section 66.907 (2) (d), Wis. Stats.

(4) A participating employe shall be considered to qualify under section 66.907 (2), Wis. Stats., only if the physicians certify that the applicant is unable to perform the duties of any position, either in municipal employment or elsewhere.

(5) A participating employe shall be considered to qualify under section 66.907 (2), Wis. Stats., only if the physicians certify that the applicant can no longer efficiently and safely perform the duties required by his position, and such condition is unlikely to improve.

(6) In the case of each application pursuant to section 66.907 (3), Wis. Stats., the agent specified in section Ret 3.01 shall submit a statement as to whether in his judgment the applicant can efficiently and safely perform the duties required by his position.

History: 1-2-56; am. Register, April, 1960, No. 52, eff. 5-1-60.