

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 director pursuant to section 41.04 (1) (b), Wis. Stats. if the application is received in the office of the department prior to the applicant's attainment of age 55, and payment shall be made in accordance with paragraph (b) when all other necessary forms and data have been received provided it is determined that the applicant is eligible for a separation benefit.

(b) Each separation benefit shall be scheduled for payment on the first day of the second month which begins after the date of receipt in the offices of the department of an application from the participant and notice of termination from the employer which includes a certification of the amount of all earnings and contributions not previously reported to the fund. Except as otherwise provided by statute, any overpayment of a separation benefit which results from erroneous certification by a participating employer, and which is not repaid by the individual overpaid, shall be charged to and collected from the participating employer which submitted the erroneous certification.

(3) **MONTHLY SCHEDULE.** Applications for retirement and beneficiary annuities, disability annuities which do not involve any medical uncertainty as to the existence of a disability, and death benefits shall be processed and paid as of the end of each month upon the approval of 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; am. (1) (c), Register, October, 1961, No. 70, eff. 11-1-61; am. (1) (a) and (d) and (3), Register, February, 1970, No. 170, eff. 3-1-70; cr. (4), Register, October, 1971, No. 190, eff. 11-1-71; am. (4), Register, May, 1972, No. 197, eff. 6-1-72; r. and recr. (1) and (2), am. (3), r. (3), Register, December, 1976, No. 252, eff. 1-1-77.

Ret 5.11 Termination prerequisite. Except as provided by section 41.11 (6) (m), Wis. Stats., no application for a retirement annuity may be filed until the participating employe has terminated all service for every participating municipality for which he has been a participating employe and for which he received compensation.

History: 1-2-56; r. and recr. Register, December, 1966, No. 132, eff. 1-1-67; am. Register, February, 1970, No. 170, eff. 3-1-70.

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examination or report which may be required by the board in order to make an informed decision regarding any application for a disability annuity or a special disability annuity.

(3) The director is authorized to require and to spend such sum as is necessary for a medical examination pursuant to section 41.13 (2) (d), Wis. Stats.

(4) A participating employe shall be considered to qualify under section 41.13 (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 41.13 (3), 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 41.13 (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; r. and recr. (2), Register, December, 1966, No. 132, eff. 1-1-67; am. (1), (3), (4), (5) and (6), Register, February, 1970, No. 170, eff. 3-1-70; am. (2), Register, May, 1972, No. 197, eff. 6-1-72.