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 finance 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; am. (1) (c), Register, October, 1961, No. 70, eff. 11–1–61.

Ret 5.11 Termination prerequisite. Except as provided by section 66.906 (2) (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.

Ret 5.12 Application withdrawal. Any application for a benefit other than a disability annuity or a special disability annuity may be withdrawn by the applicant at any time prior to approval of the application by the actuary and the executive director. Any application for a disability annuity or a special disability annuity may be withdrawn by the applicant at any time prior to approval of the application by the board. Any application withdrawn as provided herein shall have no force or effect, and any subsequent application shall be treated as a new application.

History: 1–2–56; r. and recr. Register, December, 1966, No. 132, eff. 1–1–67.

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 benefit dies prior to approval of his application by the actuary and the executive director, or prior to approval of his application by the board if the application is for a disability annuity or a special disability annuity, but the application is approved because information as to the death of the applicant has not been received, the approval of the application shall be automatically nullified.

History: 1–2–56; r. and recr. Register, December, 1966, No. 132, eff. 1–1–67.

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 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 to pay for the certifications required by (1). The board, however, may authorize the expenditure of such sums as are necessary to obtain any supplemental medical 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 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 (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 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; r. and recr. Register, (2), December, 1966, No. 132, eff. 1–1–67.