



DOA Ivanti Training 2026



Technology Check

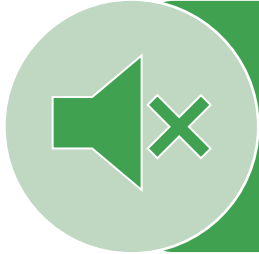


Can you see the
screen?



Can you hear
the speaker?

Ground Rules



Mute yourself throughout training



Ask questions via MS Teams chat feature



Cameras off

Learning Objectives

Describe Ivanti,
Benefits,
& Terms

Roles &
Responsibilities

Utilize Best
Practices

Log into Ivanti

Navigate Ivanti
Homepage

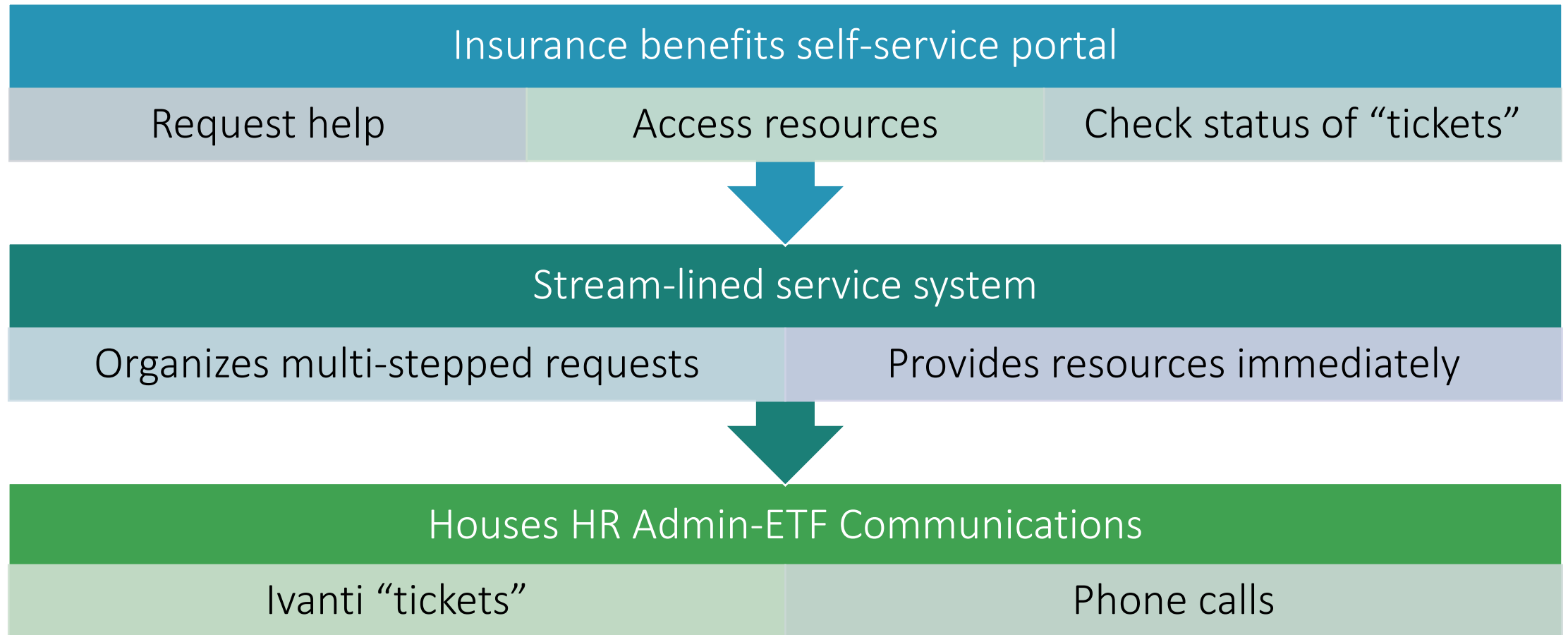
Create Incident
& Check Status

Identify
resources

Describe Ivanti



What is Ivanti?



Ivanti Benefits



24-hour access



Consolidates all
communications



Gives DOA HR
Admins status
updates



Timely service

Ivanti Terms & Definitions

Ticket

- Number assigned to request for help
- Multiple steps & follow-up
→ same ticket

Incident

- Request for assistance
(e.g. password reset, member enrollment, etc.)
- Multiple steps & follow-up
→ same incident
- Incidents resolve after agency requests

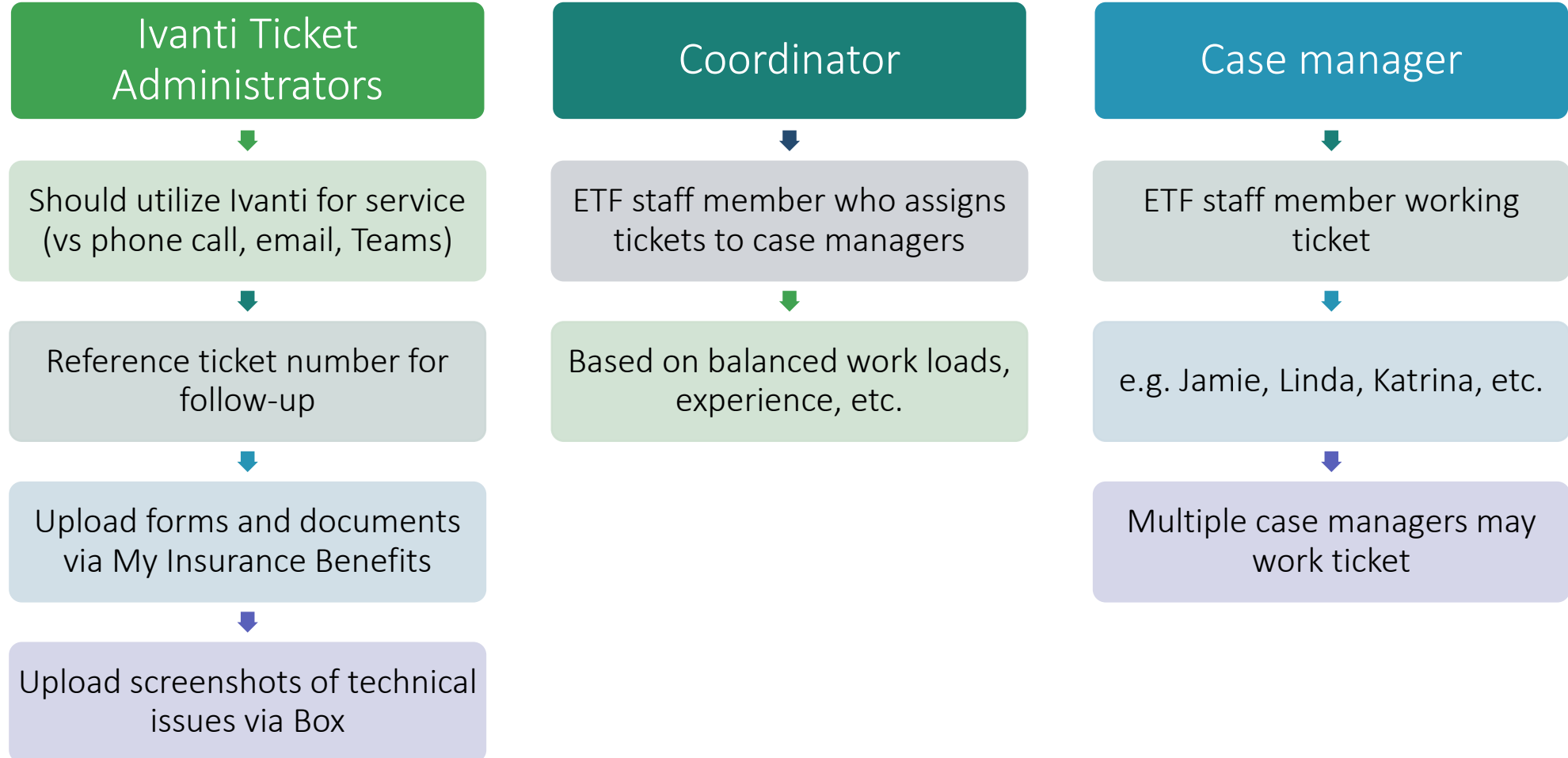
Ivanti Ticket Administrators

- HR Admins who can add or update tickets

Recognize Roles & Responsibilities



Roles & Responsibilities



Utilize Best Practices



Ivanti Best Practices



Seek help through
Ivanti (not case
managers)



Provide accurate
and concise
information



Safeguard PII



Use current ticket
for follow-up (not
new ticket)



Upload documents
to My Insurance
Benefits



Submit screenshots
of technical issues
via Box

Box — Document Uploads

What Box Is:

- Secure digital drop-box to share content

Acceptable Files:

- PDFs, JPEGs, .DOC, .XLS, etc.

Getting Into Box

- State users need Box account at Box.com (free)
- ETF needs users' names & email addresses
- ETF sends invites to those email addresses to share content



Start Using Your Box Account Today
Tell us a bit about yourself

Your Information


Full Name

Business Email Address

Password

You will receive marketing materials regarding Box products, services, and events. You may unsubscribe at any time.

By clicking the "Get Started" button, I agree to Box's [Terms of Service](#) and confirm I have read Box's [Privacy Policy](#).

I am human 

Your Current Plan:

Box Individual

- ✓ 10 GB Storage
- ✓ 250 MB file upload limit
- ✓ 1 file version

[+ Show More Features](#)

Today's Total **Free**

Get Started

Updated Workflows

Use Ivanti
throughout
service
request

- Starting
- Updating
- Referencing
- Do NOT message via Teams or email SMB

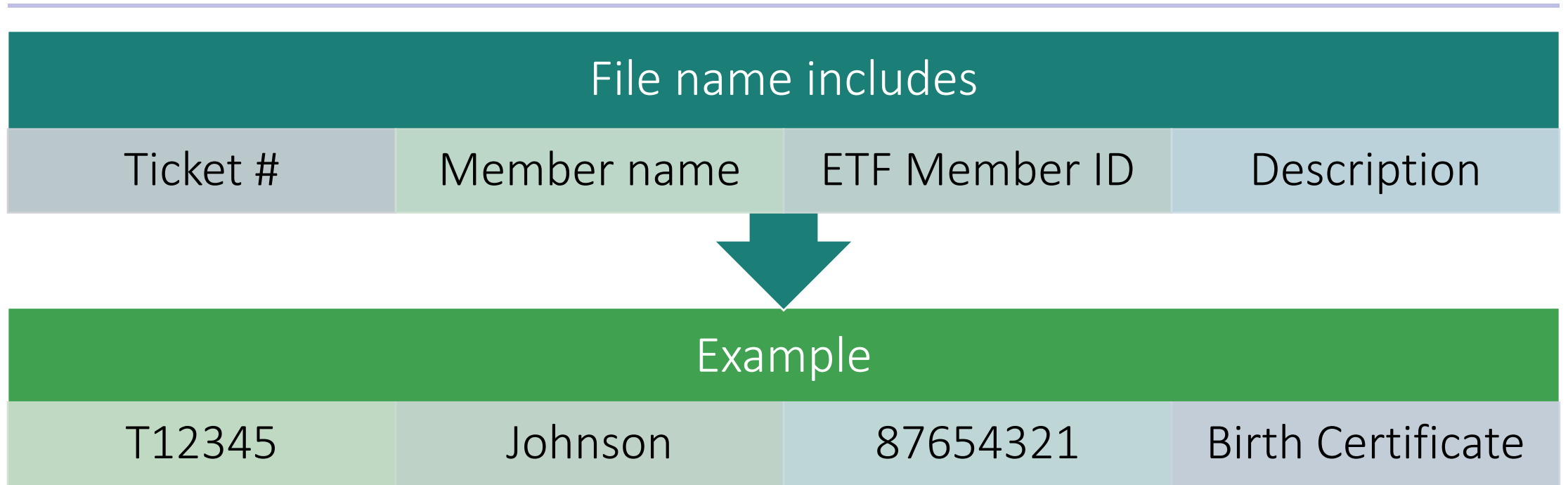
Status
updates

- Received through email
- Viewable in Ivanti
- Use Ivanti to reply

Ivanti Ticket Template

- Include Member ID & Last Name
- Include brief statement of what you're attempting to do in system
- Use specific field names & system names
- Detail the effective dates & changes (if applicable)
- Collect screenshots when possible – can be helpful for triaging issue

Naming File Attachments



Example File Name: "T12345 Johnson 87654321 Birth Cert"

Log into Ivanti



Logging into Ivanti

Use assigned IAM username and password

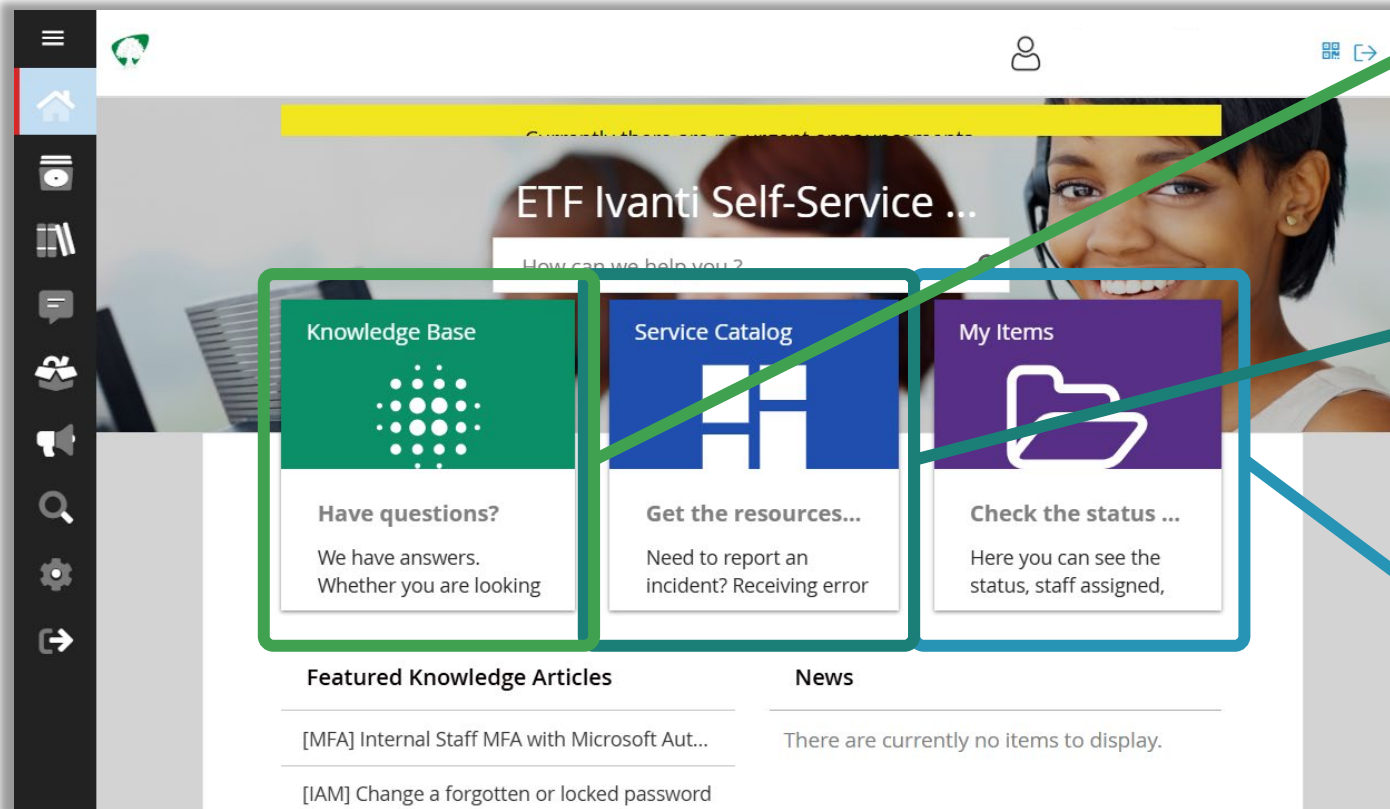
- Same as for other apps (e.g. employer portal for My Insurance Benefits)

Users will access go-live Ivanti provided through ETF

Navigate Ivanti Homepage



Ivanti Homepage Screenshot



Knowledge Base

- Self-service articles & tips
- Knowledge documents

Service Catalog

- Create new incidents
- Connect with ETF staff

My Items

- Check status of service requests
- Update or add information to existing requests

Create Incident & Check Status

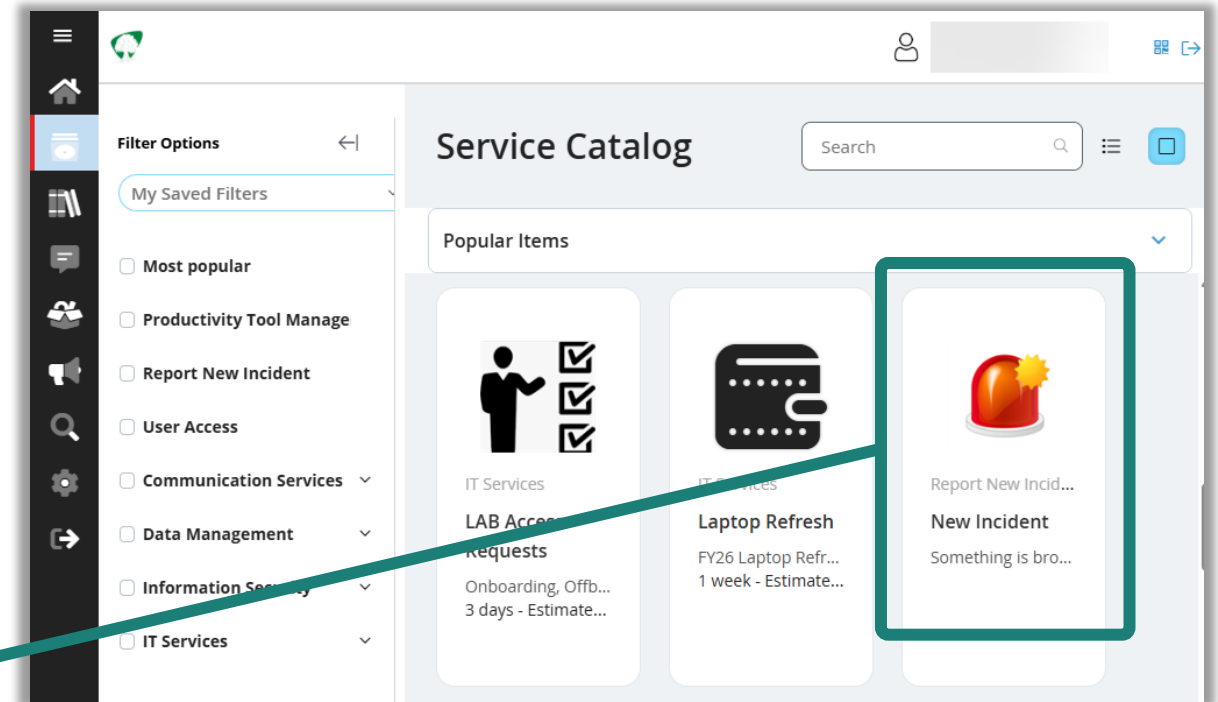


Service Catalog Screen Shot

Go to “Service Catalog”

- Homepage or tab

Select “New Incident” card



Create New Incident

New Incident
Something is broken or not working as intended

Incident ID: 85959
Status: Logged

Summary

Description

How many users could be impacted by this Incident?

What is the level of urgency?

Upload Attachments [Attach](#) [Paste](#)

[Save Incident](#)

Summary (e.g. Name Correction)

Description

- Akin to email body
- Provides details of incident

Users impacted & Level of urgency

- Accuracy matters... do not overstate

Attachments: Do not upload to Ivanti

Reminder: Will receive confirmation email

Tracking Ivanti Tickets

Central Benefits enters Ivanti tickets

Anyone can track tickets (view-only)

Click on “My Items”

Search by Ticket #

The screenshot shows the Ivanti Self-Service Mobile app interface. At the top right, the user is identified as Jake Roger Spielbauer, logged in via Self Service Mobile. A yellow banner at the top states, "Currently there are no urgent announcements." Below this is a search bar with the text "ETF Ivanti Self-Service..." and a prompt "How can we help you?". The main content area features three large tiles: "Knowledge Base" (green), "Service Catalog" (blue), and "My Items" (purple). The "My Items" tile is highlighted with a red box and a red arrow pointing to it. Below the tiles are sections for "Featured Knowledge Articles" and "News".

Knowledge Base
Have questions? We have answers. Whether you are looking for self-service articles, tips, knowledge

Service Catalog
Get the resource... Need to report an incident? Receiving error messages? Have other requests? Explore the

My Items
Check the statu... Here you can see the status, staff assigned, target resolution date and more! You can also

Featured Knowledge Articles
[MFA] Internal Staff MFA with Microsoft A...
[IAM] Change a forgotten or locked passw...

News
There are currently no items to display.

Check Ticket Status

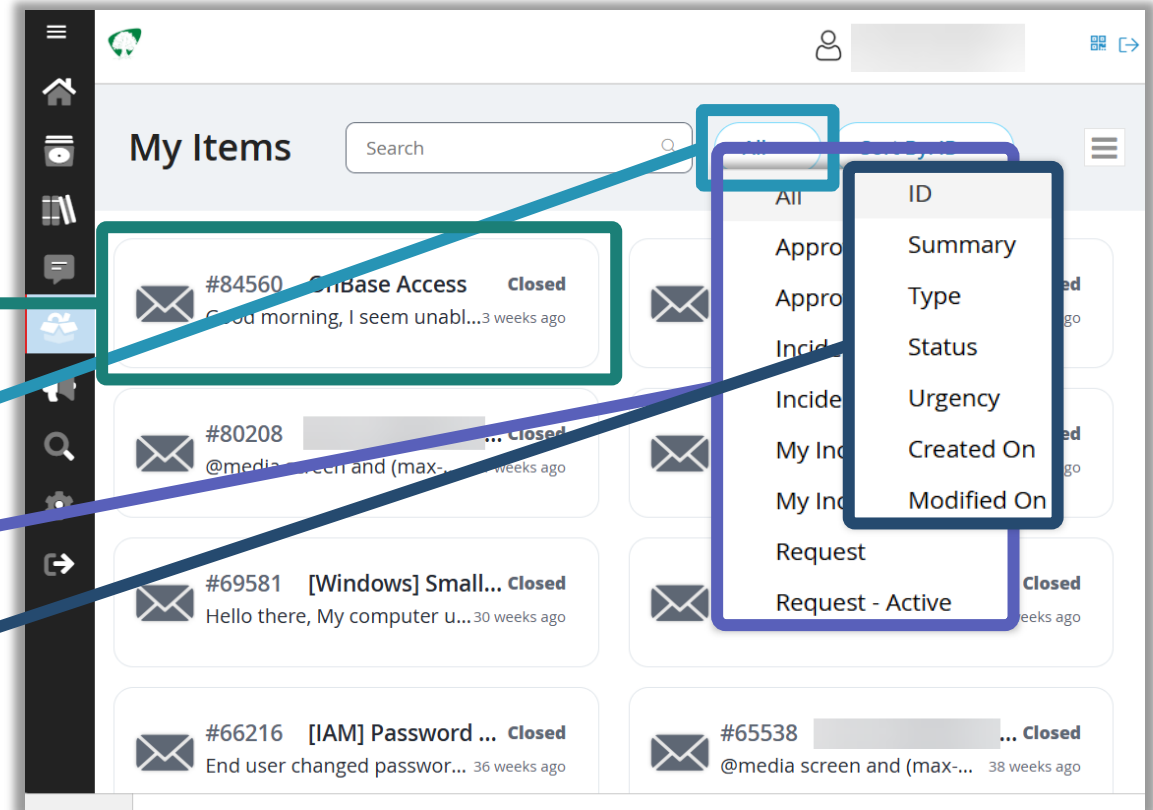
All your tickets will populate

Click on any ticket to open

Click "All" button to filter by status

Status options populate drop-down

Click "Sort By" button to change how tickets display



Ivanti Ticket Demonstration



Good ticket reminders:

- Member ID & Last Name
- Brief statement issue
- Specific field names & system names
- Effective dates & changes (if applicable)
- Screenshots when possible

Identify Resources



Support Plan for DOA – Data Corrections



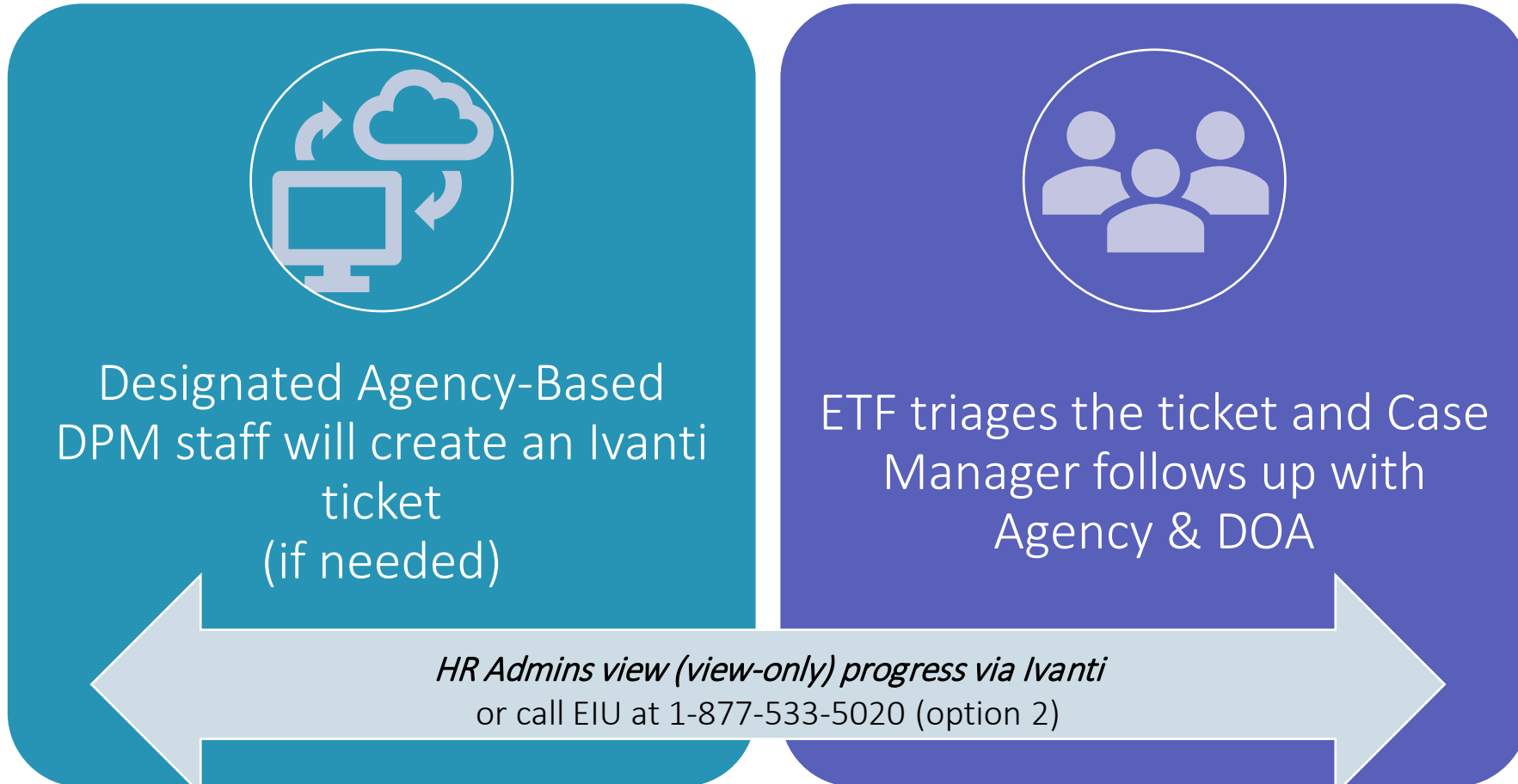
Create Jira Ticket for Data Corrections that cannot be passed on ETA file

This would include data like:

- Date of Birth
- Social Security Number (SSN)
- Hire date changes
- Termination date changes

DPM will update data in Peoplesoft & ETA UI that feeds My Insurance Benefits

Support Plan for DOA – Enrollment Issues



My Insurance Benefits Resources

Resources Tab in My Insurance Benefits

- *My Insurance Benefits Glossary* (ET-1109g)
- *My Insurance Benefits HR Admin Guide* (ET-1110)
- *My Insurance Benefits Qualifying Life Event and Change Reason Companion Guide* (ET-1141)
- *My Insurance Benefits Standard Reporting Guide*
- *My Insurance Benefits Interactive Reporting Guide*
- *My Insurance Benefits WI Member Guide* (ET-1109)

ETF Website Employer Insurance

- *Employer IAS Procedures* (ET-1111)
- *State Employer Health Insurance Manual* (ET-1118)

Benefitplace

Welcome, SWI Training Sponsor - State!

View all employees

Search by Name or SSN

Go

To-do list

View by: Please Select

Please select a category from the above dropdown.

Benefit Participation

Questions?



Thank you



etf.wi.gov



ETF E-mail Updates



1-877-533-5020

