



IAS 200:
HR Admin (Administrator) Training
Enrollment, Dependents, & Admin Tasks



Technology Check

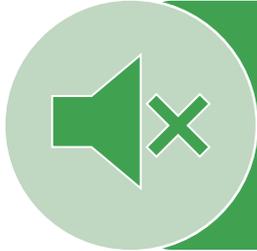


Can you see the
screen?



Can you hear
the speaker?

Ground Rules



Mute yourself throughout training



Ask questions via MS Teams chat feature



Cameras off

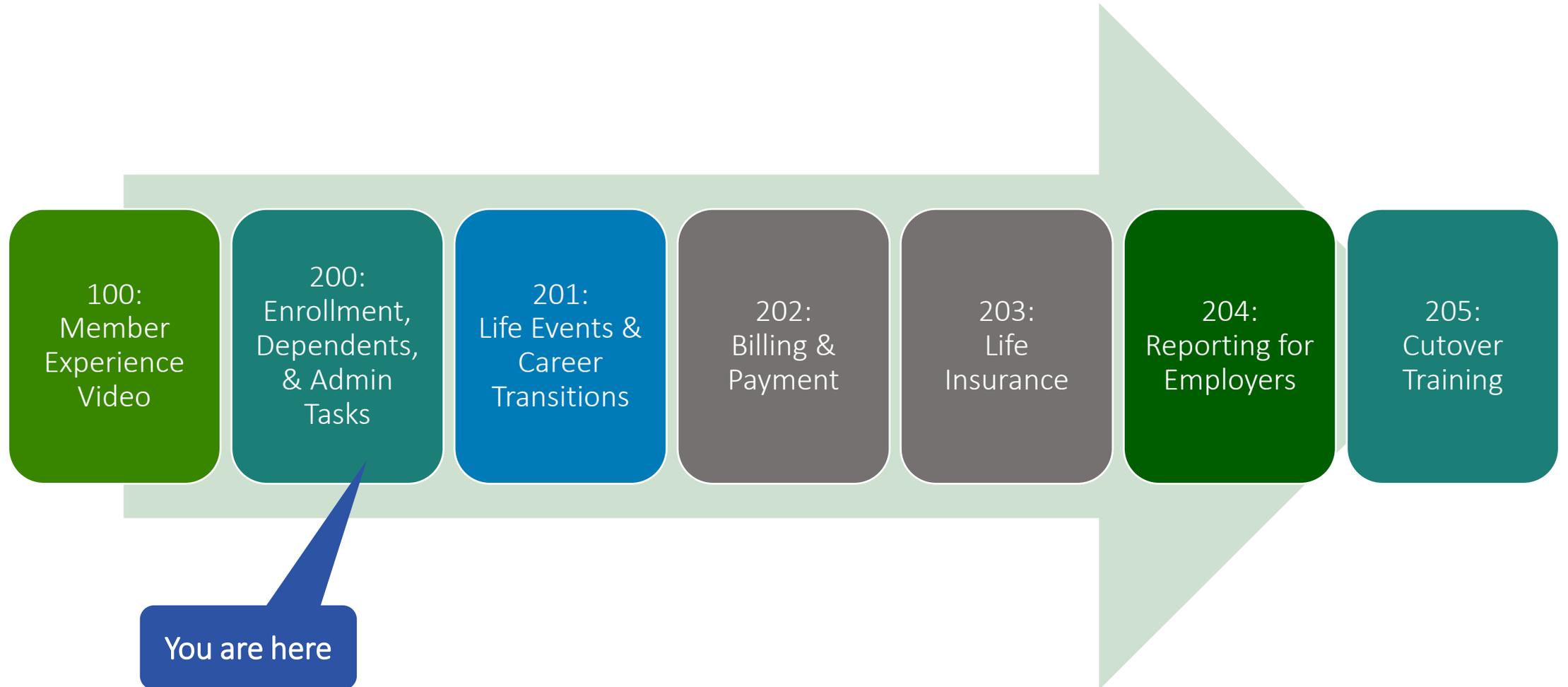
Why are we moving to My Insurance Benefits?

Empowers members

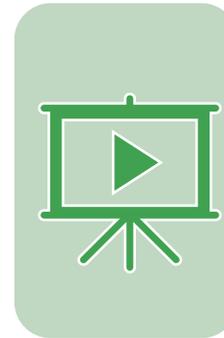
Enhances customer experience

Streamlines benefits services

DOA Learner Journey



Member Experience Video



IAS 100: My Insurance Benefits Member Experience



Reminder: Members can and should enroll in their own benefits

Learning Objectives

Define expectations

Log into My Insurance Benefits systems

Describe process flow for new hires

Navigate My Insurance Benefits as HR Admin

Support enrollment activities

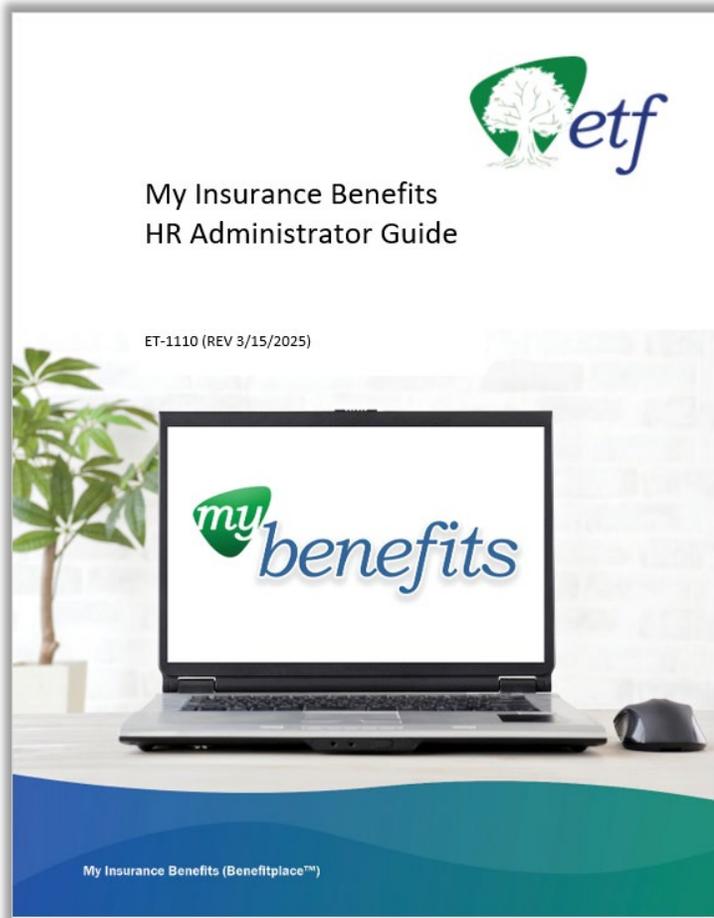
Manage documents & Verify dependents

Enroll new employees

Add dependents

Support for HR Administrators

My Insurance Benefits HR Admin Guide (ET-1110)



Robust explanation
of system

Chapters on
multiple topics

Website Resource
Page

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Define expectations

- Training expectations
- HR Admins expectations
- Member expectations



Training Expectations



Explore Content

Screenshots from system

System demonstrations



Touch points

Ask and answer questions

Clarify information



Practical Exercise

Learners log into system

Complete tasks

HR Admin Expectations

HR Admin (Administrator) Definition:

- Anyone who uses system for activities and processes outside it
- Examples: ETF Staff, HR Generalists, Payroll Analysts, Benefits Specialists, etc.
- System refers to all administrators as “Benefits Administrator”

Familiarity with My Insurance Benefits

Front line for member assistance

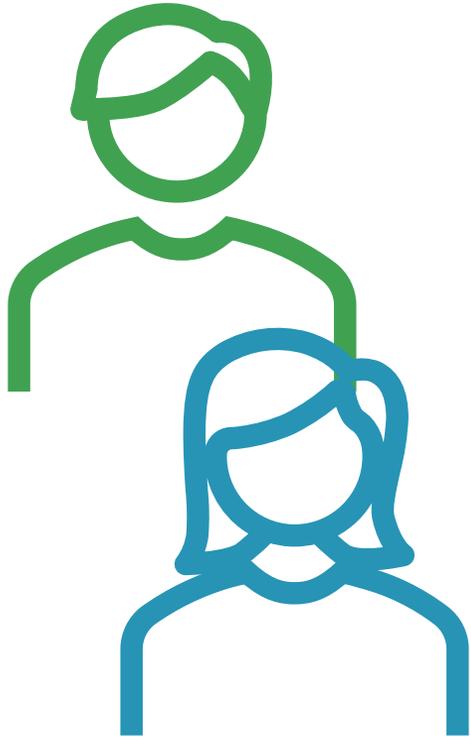
Log into My Insurance Benefits daily

Timely approval of coverage changes

Ensure data accuracy (e.g. dates match documents)



Member Expectations



Make timely benefit elections

Support life events

- Upload acceptable documents

NOTE (for awareness only): Retirees

- Only retirees with *insurance* benefits in My Insurance Benefits
- Future retirees will have reduced functionality
 - Transition from DOA version to retiree version

NOTE: HR Admins who are also members may have two log-ins

- (1st) HR Admin log-in
- (2nd) Member log-in

Log Into My Insurance Benefits Systems



My Benefits Portals Explained

My Benefits Portals = landing pages for software applications (apps)

Apps are programs designed for specific function

Smartphone examples:
Banking, Music, etc.

HR Admin portal for HR Admin apps

How ETF staff and employers will do our jobs

Administer members' benefits

Member portal for member apps

Mobile device-friendly viewing

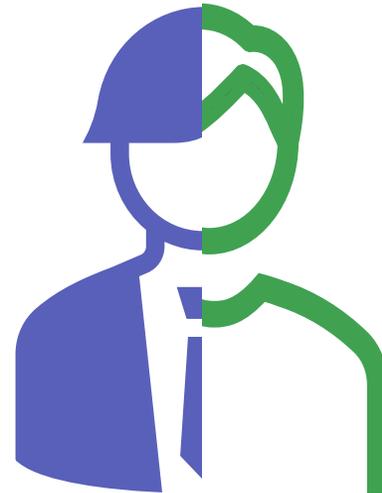
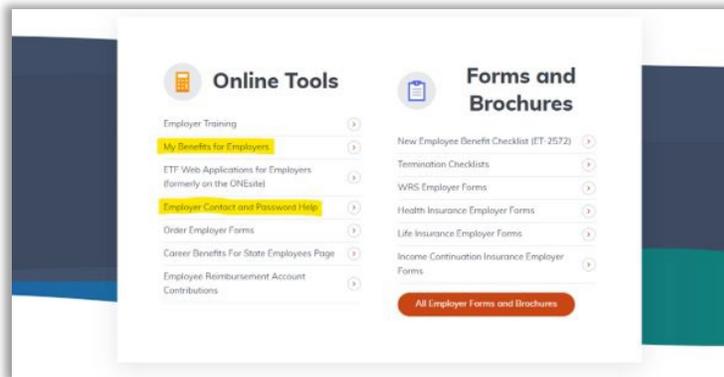
Access, view, and change their benefits

More apps planned for future

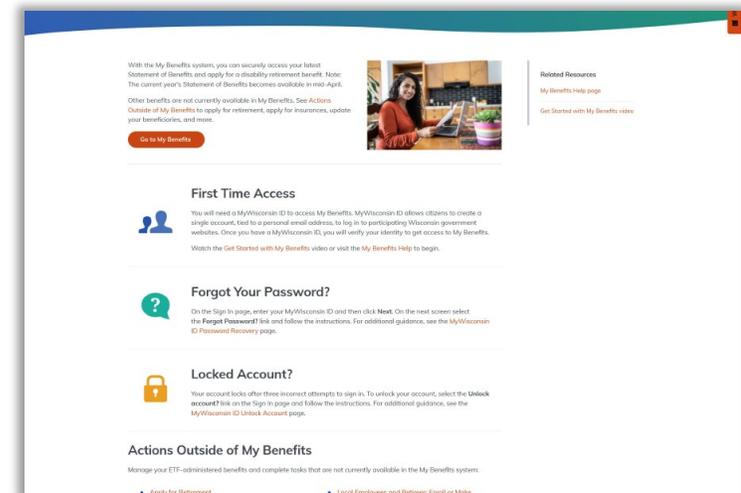
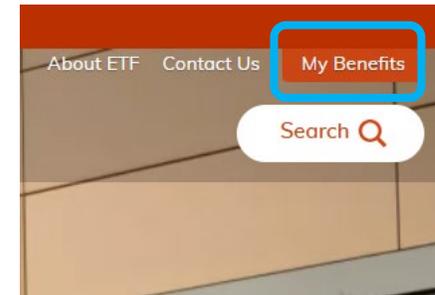
NOTE: You will get locked out of portal after four unsuccessful log-in attempts and will need to contact support for help (shown later).

Meet Joe Smith!

Employer HR Admin



Member



Joe the HR Admin



Online Access Security Agreement
Wis. Stat. § 40.07 (1)

Both pages of this form must be completed, and an agent signature is required. Please email the completed, signed form to ETFSMBEmployerSecurityAccess@etf.wi.gov. Do not mail. If you cannot email, please fax to: 608-266-5801.

Please note the following:

- A WRS Case Manager will contact new users directly with their username and temporary password.
- Existing users requiring a change in access, contact information, or a name change will be notified by email once the request is complete.
- Updating an existing user's last name will result in a new username. The existing password and security questions will not change.
- New users are automatically subscribed to ETF E-mail Updates, an ETF email service providing employers with important ETF benefits administration information. It is the user's responsibility to read, forward to others in your agency as necessary, and take the necessary action related to information in each ETF E-mail Update. Add etfwi@public.govdelivery.com to your email address book to prevent news from ETF from ending up in a SPAM folder.
- If a user account is not used over a six-month period, the account will be disabled and deleted. An Online Access Security Agreement will need to be resubmitted if the impacted user needs to regain access.

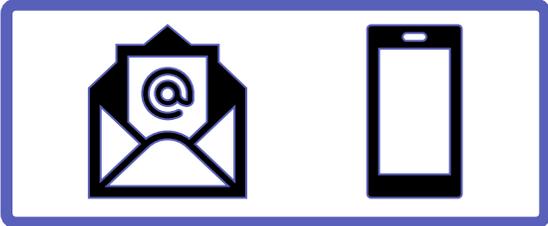
Complete form ET-8928

smithj + wxyz

IAM Username

smithj + wxyz + @wisconsin.gov

NEW to log in: "@wisconsin.gov"



MFA required

Joe the Member

Create MyWisconsin ID



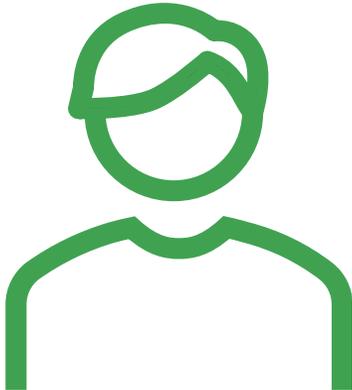
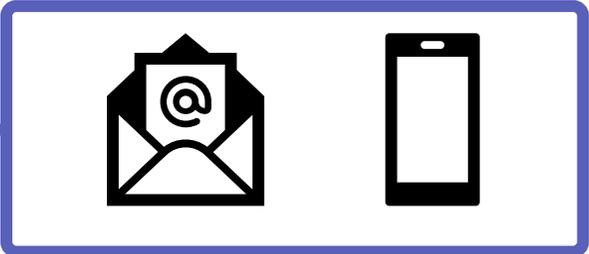
Personal email address with top-level domain (.com, .org, etc.)

= a personal email address (ex. joesmith@gmail.com)

Contact DET help desk for assistance



Multi-factor authentication (MFA) required



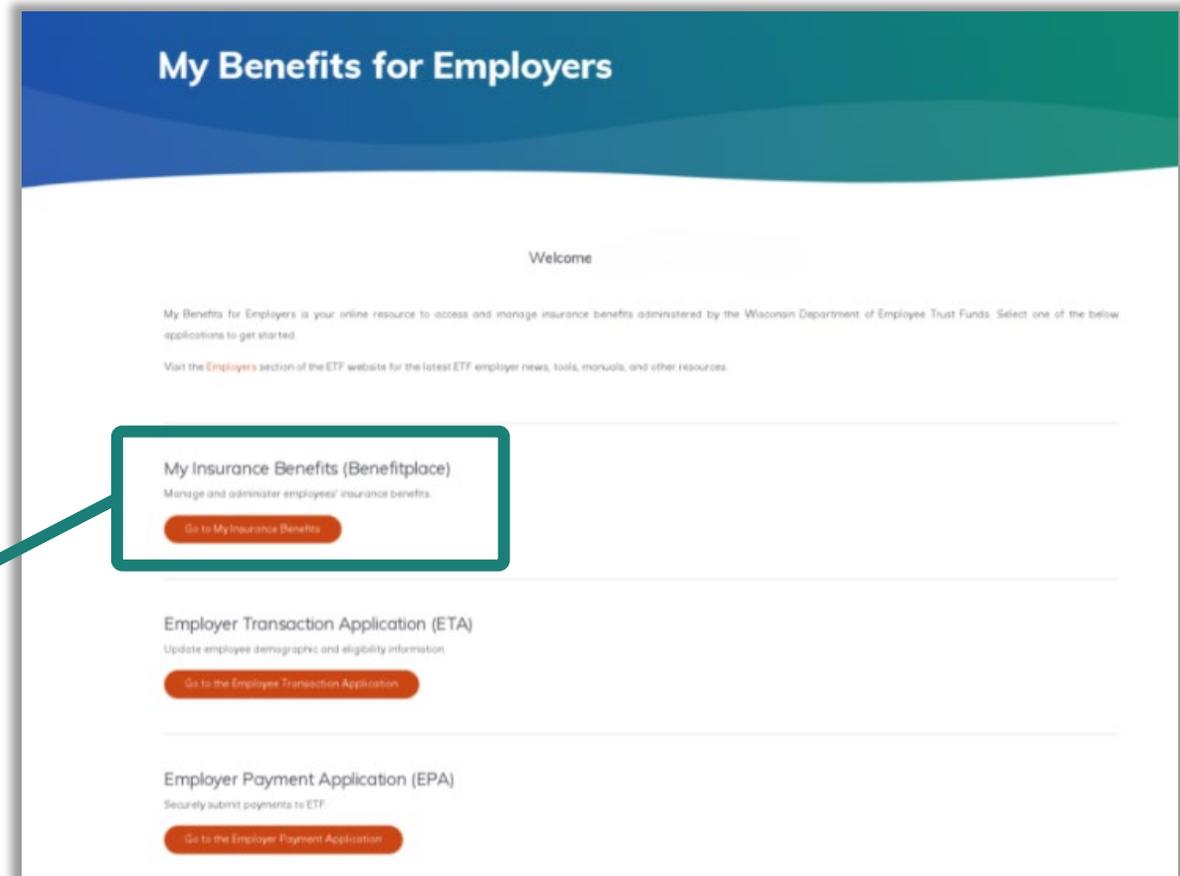
[Job aid available!](#)

Joe's My Benefits for Employer Portal

Buttons to access different systems

- Only systems he can access will appear

My Insurance Benefits



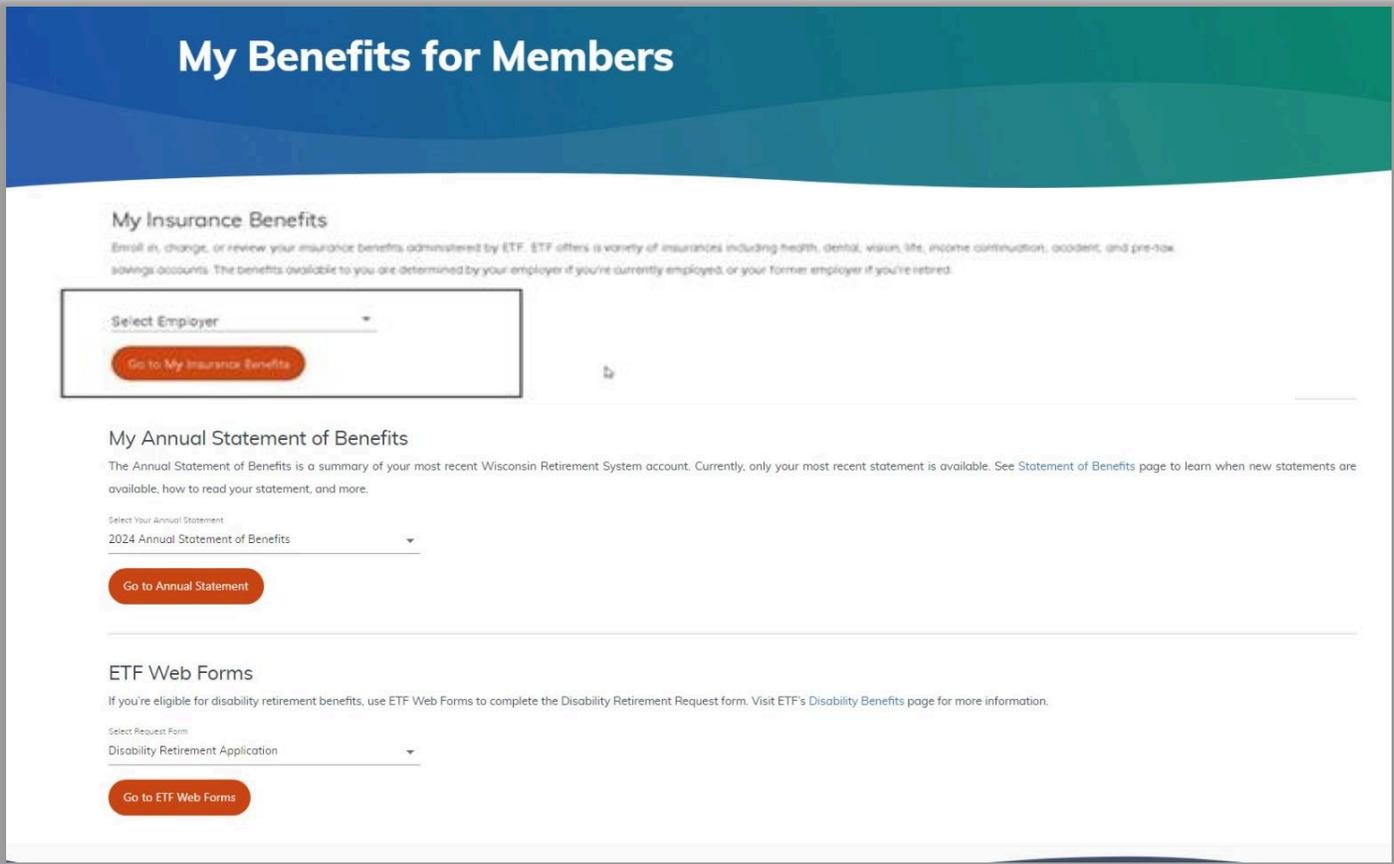
Joe's My Benefits for Members Portal

Member applications

My Insurance Benefits

Annual Statement of Benefits

Web Forms



My Benefits Portal Resources and Troubleshooting



HR Admin

- ETF Website support pages (IAM, access form, MFA)
- Employer Insurance Unit (EIU)



Member

- DET & ETF websites (walkthroughs, videos, FAQs)
- DET help desk: 608-471-6667



NOTE: HR Admin and Member access ends upon termination

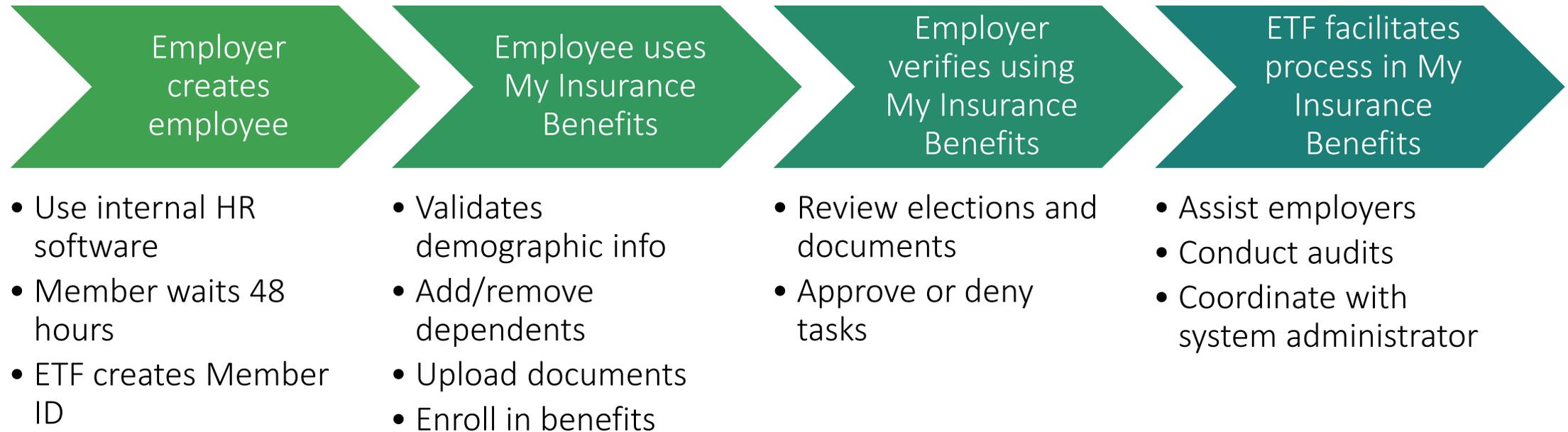
- DOA: Can term in PeopleSoft up to 7 days in advance

Describe Process Flow

- New hires



New Hire Process Flow



NOTE: There are multiple ways to do things

Touchpoint – Questions?



- Expectations
- Logging in
- Process flow



Navigate My Insurance Benefits

- HR Admin home page
- Member categories
- Gotchas and good-to-knows



Note About Screen Shots

Screenshots taken at different times logging into system

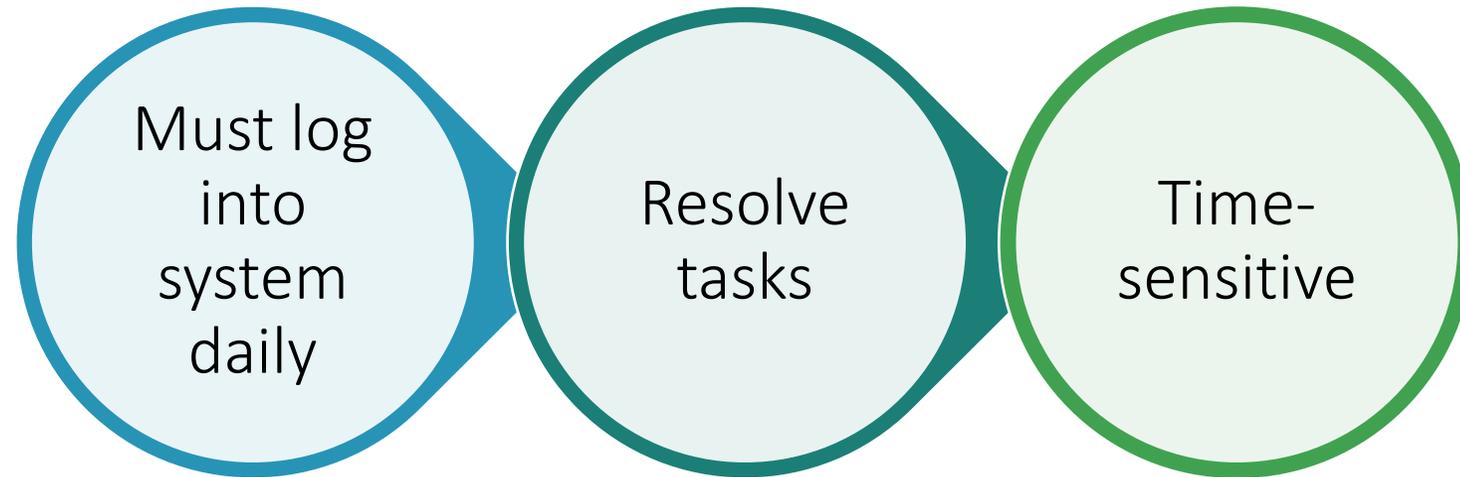


Some screenshots might look slightly different than future state

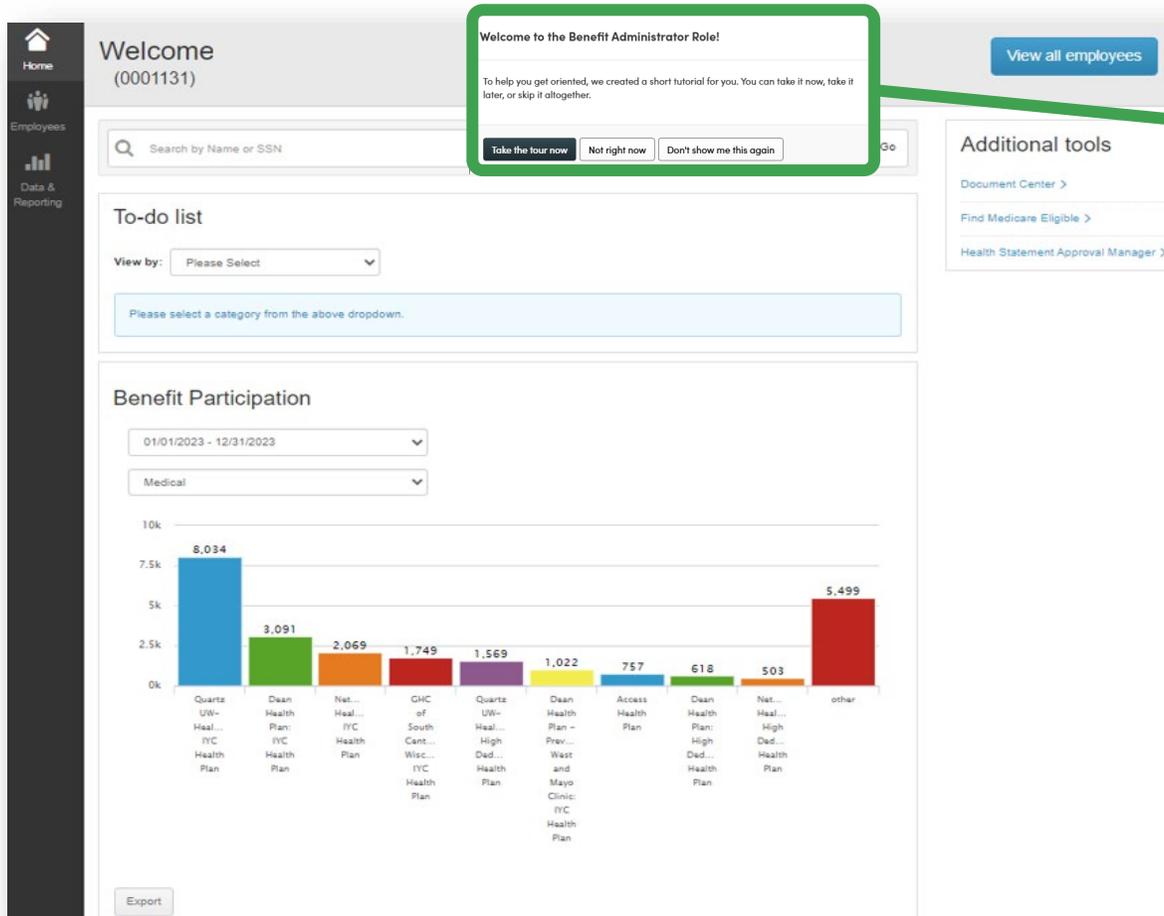


Screenshots taken from standard computer, not smartphone or tablet

My Insurance Benefits & Daily Activities



My Insurance Benefits – Home page



Welcome pop-up

Icons

Member search bar

To-do list

Benefit participation chart

Icons



Home → main landing page

- Review to-do list
- Access enrollment info and other tools and menus

Employees → access member records

- Member search bar
- Filters to narrow search

Data → reports you can run

- Members, benefits, payroll, and more
- Transaction history

Member search bar

Tool used to:

- Open member records
- Complete tasks associated with that member

Filter members by:

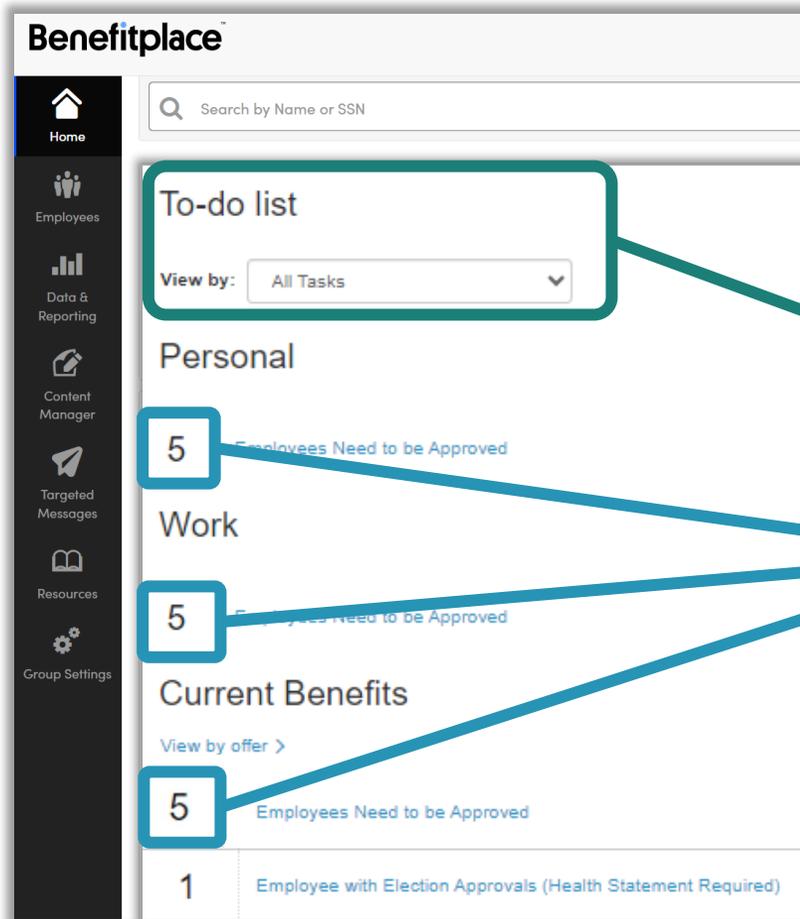
- Default: Last name (no accent marks) or SSN
- ETF Member ID
- Click “Remember this selection”

Advanced search by:

- Member status (active, retired, etc.)
- Benefits status
- To-do list

The screenshot shows a search interface with a search bar at the top containing the text "Search by Name or SSN" and a "Go" button. Below the search bar, there are sections for "To-do list" and "Benefit Participation". A "View by:" dropdown menu is set to "Please Select". A callout box titled "Search By..." is open, showing four options: "Name or SSN" (checked), "Employer ID", "ETF Member ID", and "Remember this selection". A blue callout box points to the "Advanced search" link at the bottom of the callout. Another blue callout box points to the "View by:" dropdown menu.

To-do List



Personal dashboard for outstanding tasks:

- Changes require approval
- Documentation is submitted
- Information is missing

“View by” to filter tasks by type

- Job aid available

Numbers indicate members with that task type

Many types of tasks → See supporting resources

NOTE: Each employer sets own workflow

Task list can vary by role and available benefits

Select Employer Sub-Unit (if applicable)

Select "View by"
under To-Do List

Select "Employer
Unit"

Select sub-unit

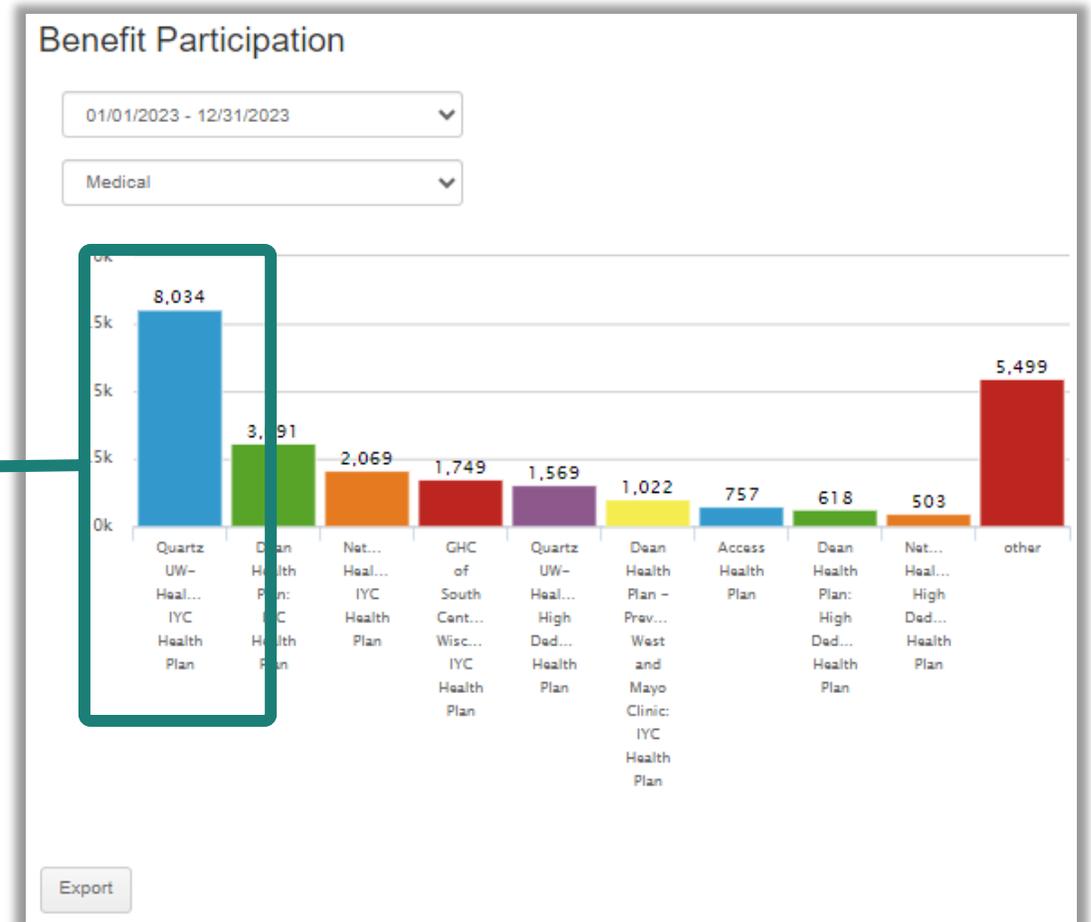
The screenshot displays the Benefitplace interface for a user named Jason Spielbauer. The main content area shows the 'To-do list' section with a 'View by:' dropdown menu set to 'Employer Unit'. A callout box highlights the 'Please Select' dropdown menu, which contains a list of sub-units: Administration, Ag, Trade & Consumer Protctn, Assembly, Bd for People with Dev Disab, Bd of Commiss of Public Lands, Bd on Aging & Long Term Care, Child Abuse & Neglect Prev Bd, Children and Families, Circuit Courts, Commissioner of Insurance, Corrections, Court of Appeals, District Attorneys, Educational Communications Bd, Elections Commission, Employee Trust Funds, Employment Relations Comm, Ethics Commission, Financial Institutions, and Please Select.

Benefit participation chart

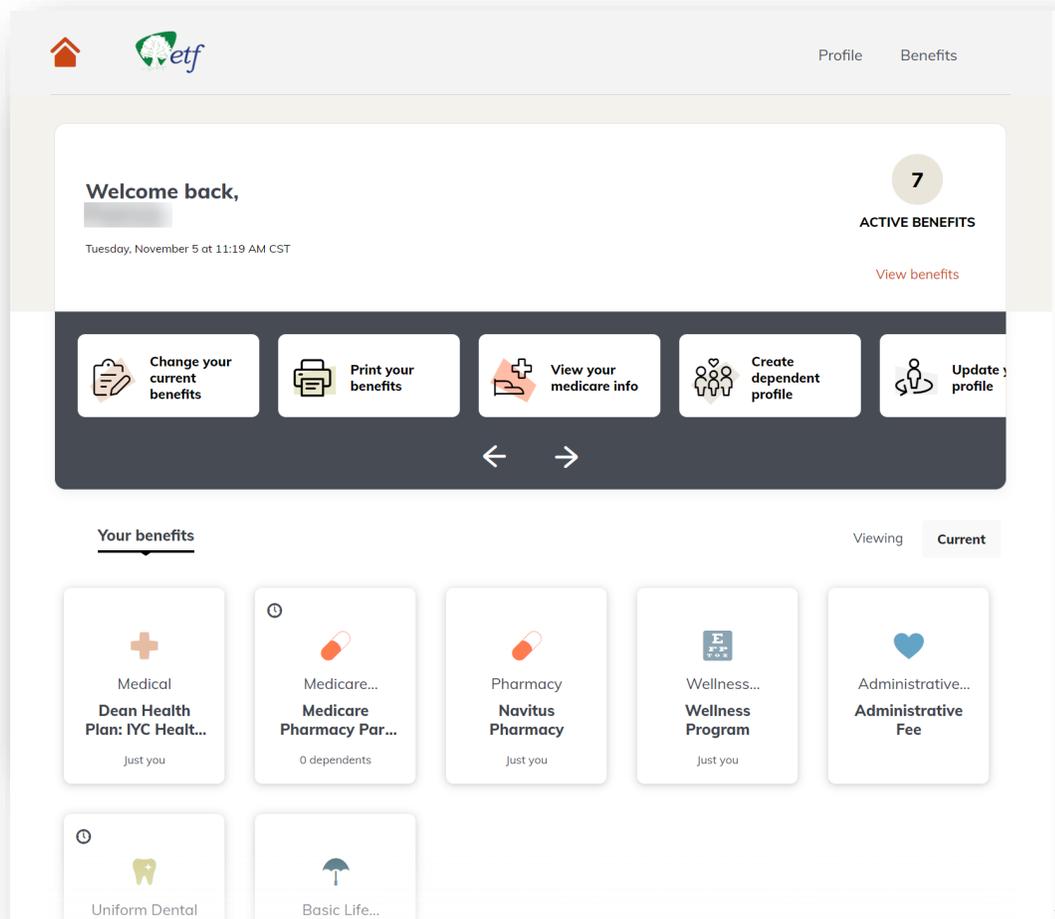
Chart summarizes enrollment by plan year and health plan

Click any bar to:

- Create report listing enrollees in that plan
- Run Benefit Detail Report to get enrollment details across all plans



Member role



See the system exactly as members view it

Search for a specific member, then “View in member role” under Manage Employee

Member role opens in a new tab/window

HR Admin can make changes in Member Role

NOTE: Making changes in Member Role requires log-out when finished

Member Categories

Key bits of information about members and their benefits

Values reflect and drive benefits eligibility and payment

Useful in searching, filtering, reporting, and more

Categories [Edit](#)

Calendar Set / 12	Current Age for Basic Life / 70+	Dental Payment Source / NA	Dual Employment / N	Employee Type / 07
Employer Medical Surcharge / NA	Employer Sub-Unit / 0000001-00001-00	Employer Unit / ETF Retirees and Inactives		
Employer Unit Program Option / P01	Employment Status / RT	Health Insurance at Retirement / Y	Health Payment Source / DP	
ICI Contrib Wait Period Met / N	ICI Premium Category / NA	ICI Premium Waiver / N	Legacy Life / N	Life Payment Source / NA
Life Premium Waiver / N	Medical Contrib Wait Period / NA	Medical Premium Contribution / NA	Medicare Some Rate Override / N	
Opt Out Incentive Eligible / NA	Out of State Employee / N	Previous Employer / 0001131-00013	Primary Employer / Y	
Protective Status / N	Rehire / N	Tax Status / Post	Under 70 When Hired / Y	Unique Plan Eligibility / 1
UW Premium Waiver / N	UWHC Premium Waiver / N	Vision Payment Source / NA	WRS Eligible / N	

NOTE: Categories displayed vary according to user permissions and applicable benefits

Gotchas and good-to-knows



Times out after 15 minutes of inactivity (security req.)



DON'T click browser back button



Double-click with care



Filters set up *may* go away when logging off



When searching, enter first few characters to see list of matching records



Type or click "Today" for inputting today's date



Key "," (comma) in member search to display all members

Touchpoint – Questions?



- Navigate My Insurance Benefits



Support Enrollment Activities

- Importance of timeliness
- Date rules
- New hire date rules
- Updates on Supplemental Benefits
- Updates on ICI Benefit



Importance of Timeliness



All events have deadlines for actions

- Enrollment deadlines
- Date rules for life events
- Documentation deadlines



Untimeliness has negative downstream impact

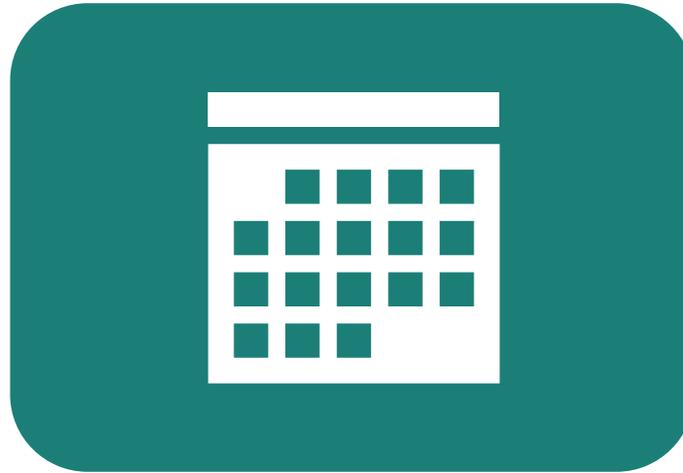
- Denial of coverage
- Impact invoicing
- Late fees

TAKEAWAY: Timeliness should be the norm!

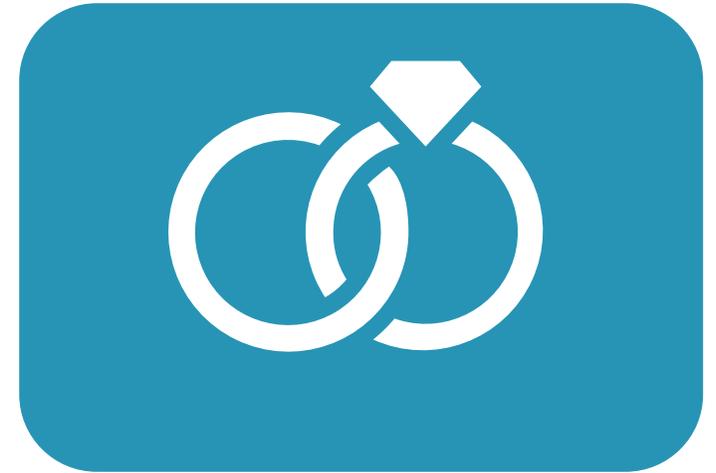
ETF Date Rules



New hires



Open enrollment
(training closer to date)



Life Events
(IAS 201)

NOTE: Most date rules are NOT changing

Date Rules & Definitions

Date Rules:

- Rules for when coverage can be changed.
- Examples: Coverage added, terminated, effective date, etc.

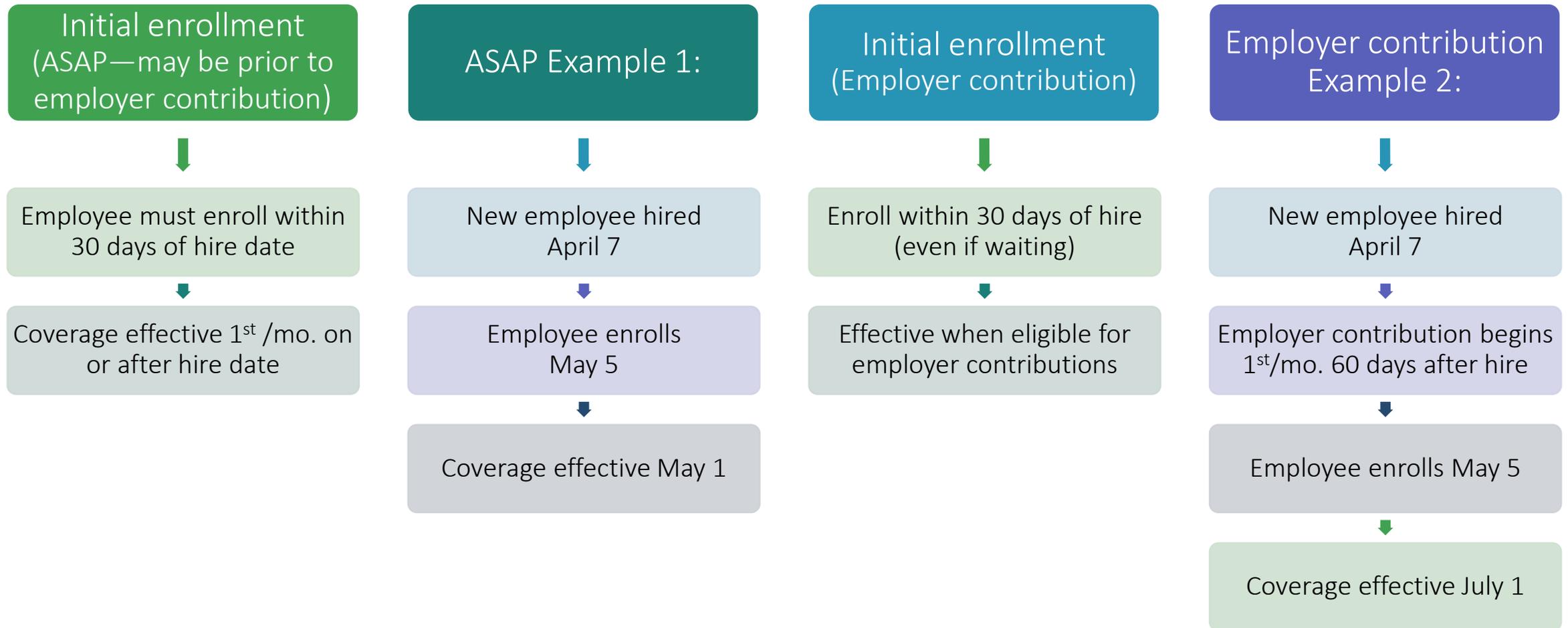
New Hire:

- Employee new to employer (not rehire or transfer)
- Could also refer to someone newly eligible for benefits

Initial Enrollment:

- Period for new hire to enroll in health insurance
- Two options:
 - (1) ASAP: 1st/mo. on or after date of hire
 - (2) After employer premium contributions
- NOTE: New hires can make changes to their elections within 30 days of hire

New Hire Date Rules for Health



Updates for Supplemental Benefits

Once cutover starts, enrollment shifts from vendors to ETF

ETF has enrollment forms, if needed

- Different than vendor forms

Retiring employees automatically enroll, no forms needed

- Can use forms to opt out if needed

Updates for Income Continuation Insurance (ICI)

Initial enrollment offered to new hires

NOT offered with life events

Need participating employer

Enrollment opportunities: State

- Initial enrollment
- Deferred Coverage
- Evidence of Insurability (EOI)

Employer triggers ICI enrollment event by creating new hire



None of this is new



This is NEW!

Manage Documents & Verify Dependents

- Access documents
- Upload documents

Reference: *My Insurance Benefits HR Administration Guide Chapters 7 & 8*



Document Reminders



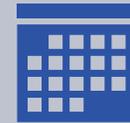
Documents become part of member's permanent record stored in OnBase



Members should upload their own documents



HR Admin should *thoroughly* review documents to ensure quality and accuracy



Detail examples:
Names, Dates, SSNs, Cut-off date eligibility, etc.



Documents used for multiple tasks (e.g. enrollment, health plan change, etc.)

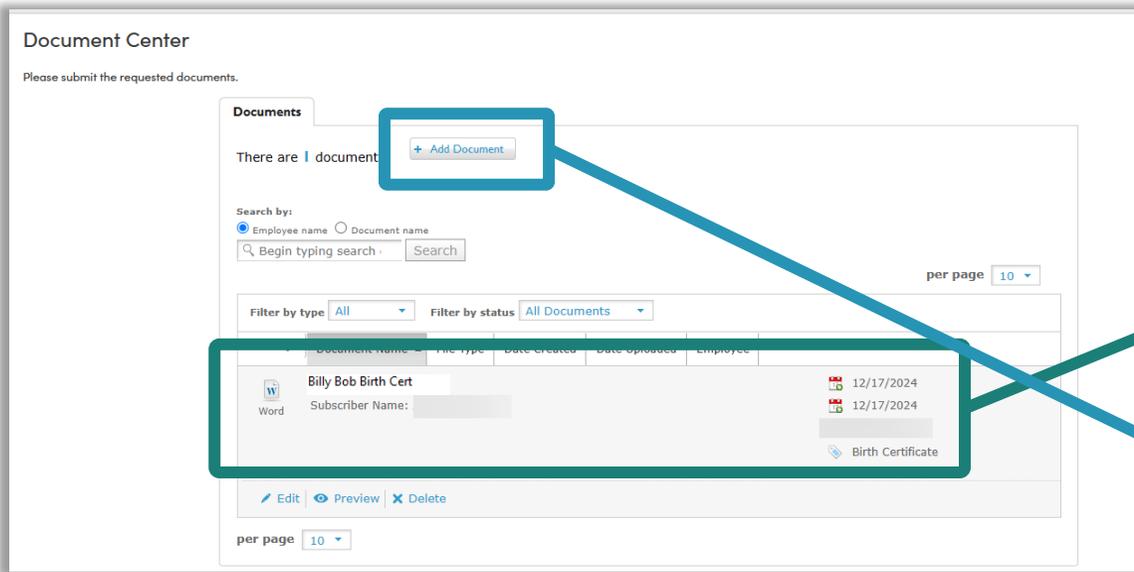
Access Documents

Open member record

Click on
“Documents”
button

The screenshot displays the Benefitplace web application interface. The top navigation bar includes the Benefitplace logo, a search bar with the text "Search by Name or SSN", and a user profile for Jason Spielbauer. The left sidebar contains a navigation menu with the following items: Home, Employees, Data & Reporting, Content Manager, Tracked Messages, Resources, and Group Settings. The "Documents" button is highlighted with a red box. The main content area shows a "Back to employees" link, the company name "SWI University of Wisconsin System-0001131", and a "Manage Employee" button. Below this, there is a section for "Sections To Be Completed" with a "Start" button. The "Benefits Snapshot" section lists three benefits: Medical (\$115.62 Semi-Monthly), Pharmacy (\$20.89 Semi-Monthly), and Wellness Program (\$0.70 Semi-Monthly).

Document Center



Document Center will load

Can view and access existing documents

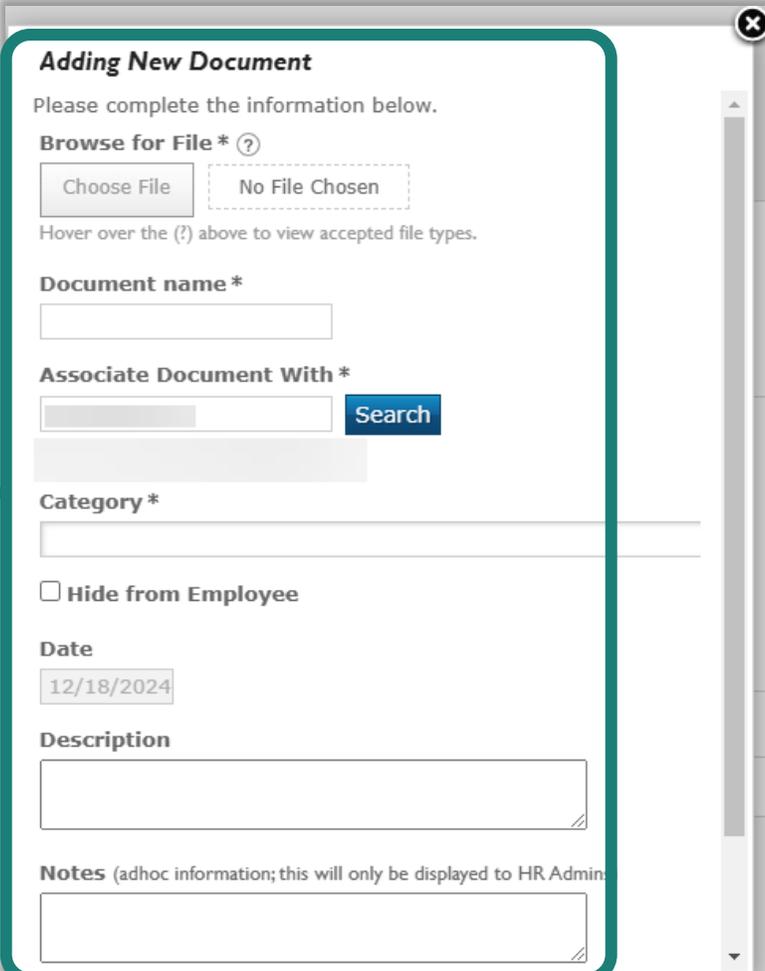
Click “Add Document” button to upload

Upload Document

Adding New Document tool will load

Upload document and fill in required fields

Click “Save” button when complete



Adding New Document

Please complete the information below.

Browse for File * ?

Hover over the (?) above to view accepted file types.

Document name *

Associate Document With *

Category *

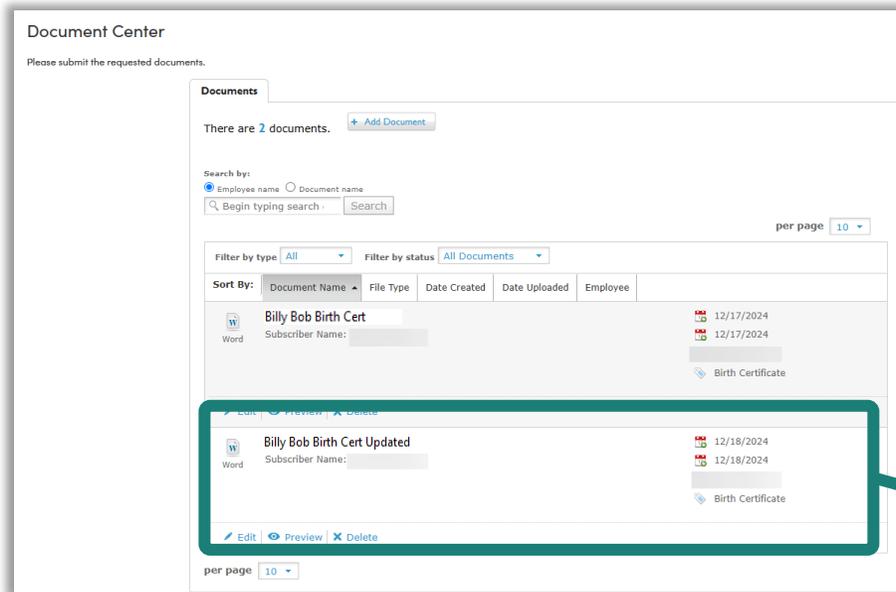
Hide from Employee

Date

Description

Notes (ad hoc information; this will only be displayed to HR Admin)

Document Upload Success



Document Center will reload

New document will appear

Errors Uploading Documents

Error noticed before approval

- Delete and upload correct document

Error noticed after approval

- Document part of member's permanent record
- Contact ETF
- *Do NOT try to fix this yourself*

Why Dependent Verification?

Streamlines enrollment process

- Eliminates inconsistent verification requirements
- Encourages timeliness for members supplying documents
- Errors slowed enrollment process

Prevents fraud and controls costs

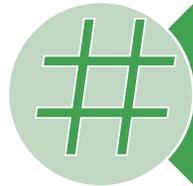
- Ensures dependent eligibility
- Reduces costs from fraudulent claims

NOTE: for *new* dependents going forward

More information on ETF website



Dependents & Social Security Numbers



Dependents need Social Security Numbers (SSNs) or ITINs



Dependents can be added without

Newborns must be added within 1 year → Others ASAP



Vendors need SSNs



SSNs helpful for searching

Dependent Verification To-Do Task

The screenshot shows the Benefitplace dashboard with a sidebar on the left containing navigation icons for Home, Employees, Data & Reporting, Content Manager, Targeted Messages, Resources, and Group Settings. The main content area is divided into several sections: 'Employee Needs to be Approved' (1 item), 'Employees with UPID Discrepancies' (4 items), 'Work' (20 items), 'Current Benefits' (with a 'View by offer >' link), 'Employees and/or Dependents with Invalid Data' (2 items), and 'Benefits not started' (with an enrollment period of 01/01/2024 - 12/31/2024 and 15 selected benefit offers). A blue box highlights the 'Dependent Information' section, which contains one item: 'Employee with Documents Pending Approval'. A blue callout line connects this item to a text box on the right.

Very common task

Important to verify dependent *before* completing QLE tasks

Members create dependents in system

- Member creates when they first add to coverage
- HR Admins *can* create, but members should (more secure and faster)

HR Admins verify dependents

Click on “Employee with Documents Pending Approval”

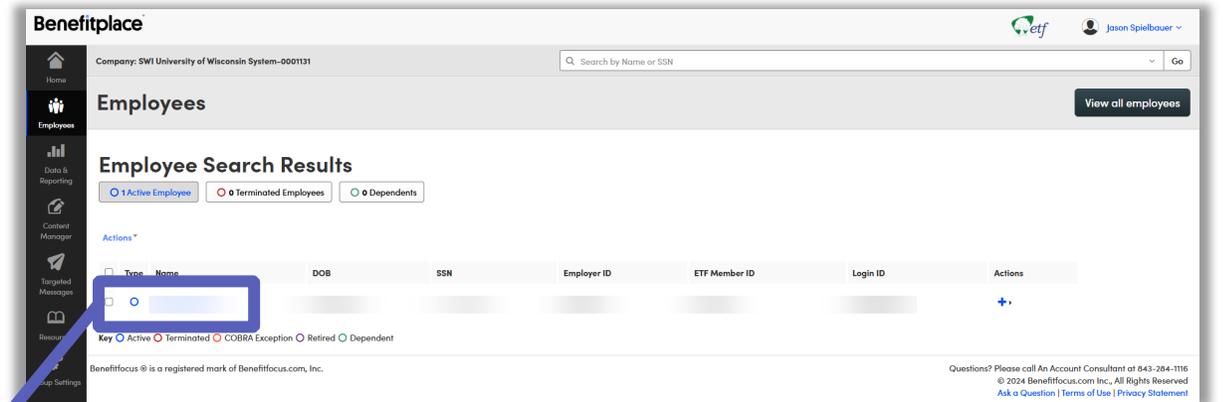
Employees with Dependent Verification

New task screen loads

Members displayed based on filter

Color-coded key for member status (e.g. active, retired, etc.)

Click on member name to load their record



The screenshot shows the Benefitplace interface for the company "SWI University of Wisconsin System-000131". The page is titled "Employees" and displays "Employee Search Results". There are three filter buttons: "1 Active Employee", "0 Terminated Employees", and "0 Dependents". Below the filters is a table with columns: Type, Name, DOB, SSN, Employer ID, ETF Member ID, Login ID, and Actions. A blue box highlights the "Name" column, and a blue arrow points from the text "Click on member name to load their record" to this box. A key below the table indicates: "Key: Active (blue circle), Terminated (red circle), COBRA Exception (orange circle), Retired (grey circle), Dependent (green circle)".

Type	Name	DOB	SSN	Employer ID	ETF Member ID	Login ID	Actions
<input checked="" type="radio"/>							+

Key: Active Terminated COBRA Exception Retired Dependent

Open Member Record to Complete Task

The screenshot displays the Benefitplace interface. At the top, the logo 'Benefitplace' is on the left, and 'etf' and 'HR AdminState002' are on the right. A navigation sidebar on the left includes links for Home, Employees, Data & Reporting, Targeted Messages, Resources, and Group Settings. The main content area shows the member record for 'Ana Perez2 (ANAP1102)' with contact information and a 'Manage Employee' button. A notification box titled 'Ana has 2 pending tasks' is highlighted with a green border. It contains a warning icon and the text 'Sections To Be Completed' followed by 'Missing Dependent Verification - Documentation Pending for Max Perez2.' A 'Start' button is located at the bottom right of this notification box.

Member record will load

Notification for pending tasks

Click "Start" button

Dependent Verification Document Center

Document Center will load

Explanation of status “document required”

Document “Pending Approval”

Benefitplace etf HR AdminState002

Company: SWI Training Sponsor - State

Search by Name or SSN

Ana Perez2 (ANAP1102)
525-01-1102 | ana.perez@gmail.com

Document Center

For requests with a status of "Document Required", upload a document to associate it. The Document will then show as "Pending Approval" until it is approved or denied by an administrator. When adding a document through the "Add Document" option, it can then be associated with a "Document Required" request and can be viewed by selecting the filter for "All Documents".

Documents

There are 1 requests

0 Document Required, 1 Pending Approval, 0 Approved, 0 Denied, 1 All Documents

Dependent Verification Document Review

Filter by type **All** Filter by status

All Requests Sent on API **All**

Sort By:

Document Name Date Created Date Uploaded Employee

Sent on API

Max Perez2 Birth Cert 04/17/2025
Dependent Name: Max Perez2 04/17/2025
For more information about required documentation, click Perez2, Ana
here. Birth Certificat

Approve Deny Disable Edit **Preview** Download

Send on API

per page 10

Next

Scroll down to find uploaded document

Preview document to review

- Legibility, parent & child names, etc.

Click approve to verify dependent

NOTE: Deny does not notify member... HR Admin should notify

Touchpoint – Questions?



- Accessing documents
- Uploading documents
- Dependent verification



HR Admin Enroll New Employee & Add Dependents

Reference: *My Insurance Benefits HR Administration Guide*
Ch.10: Enrolling a Member in Benefits



Changes related to Member Elections



Members should enroll themselves & add dependents



HR Admins may enroll or add dependents – not preferred



HR Admin elections require paper app & leave “paper trail”

Search for Member

Search member

ETF Preferred:
Member ID (MID)

State Preferred:
Employer ID

The screenshot displays the Benefitplace interface for the SWI University of Wisconsin System (0001131). The search bar is highlighted with a green box, and a callout box points to it. The 'To-do list' section has a callout box pointing to a dropdown menu. The 'Benefit Participation' section shows a bar chart with a value of 10,889.

Benefitplace Welcome, SWI University of Wisconsin System! (0001131)

Search by Name or SSN

To-do list

View by: Please Select

Please select a category from the above dropdown.

Benefit Participation

01/01/2024 - 12/31/2024

Medical

12.5k

10k

10 889

Additional tools

- Auto Enrollment Summary >
- Document Center >
- Find Medicare Eligible >
- Health Statement Approval Manager >

View all employees Add a new employee

Jason Spielbauer

New Employee Overview

Benefitplace™

Home

Employees

Data & Reporting

Targeted Messages

Resources

Group Settings

Overview

Benefit details

Dependents

Documents

Interactions

Employee history

EMPLOYEE REPORTS

Employee Detail Report

Employee Benefit Summary Report

Ben Johnson2 (BENJ2102)

325-01-2102 | ben.johnson@gmail.com

Ben has 10 pending tasks

Actions To Be Completed

Health Benefits and Health Savings Account 2025 - Section not started.

Dependent Day Care 2025 - Section not started.

Supplemental Dental 2025 - Section not started.

Vision 2025 - Section not started.

Accident 2025 - Section not started.

Life Insurance 2025 - Section not started.

Member Overview page loads

Includes member information and benefits information

Click “Benefit details” button to edit benefit

NOTE: Available benefits vary based on what employer offers

Getting Started – Enrollment

Benefit detail page loads

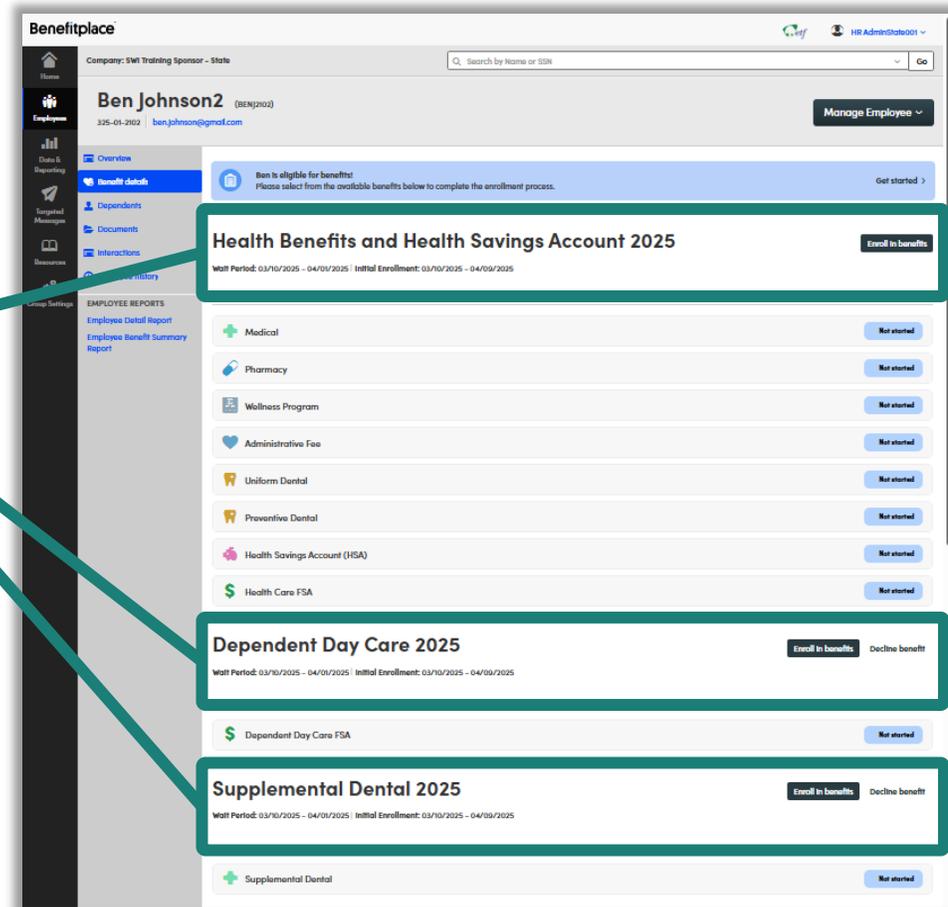
NOTE: Only benefits offered will appear

- If not offered, benefits won't appear

NOTE: Two enrollment opportunities during OE

- Clearly delineated

Click “Enroll in benefits” button



Select Health Plan and HSA

Benefitplace

Company: SWI Training Sponsor - State

Search by Name or SSN

Ben Johnson2 (BENJ2102)
325-01-2102 | ben.johnson@gmail.com

Overview
Benefit details
Dependents
Documents
Interactions
Employee history

EMPLOYEE REPORTS
Employee Detail Report
Employee Benefit Summary Report

Plan

*Select A Plan Offered By State of Wisconsin

- Access Health Plan 2025
- Access High Deductible Health Plan 2025
- Aspirus: IYC Health Plan 2025
- Aspirus: High Deductible Health Plan 2025
- Common Ground: IYC Health Plan 2025
- Common Ground: High Deductible Health Plan 2025
- Dean Health Pl
- Dean Health Pl

Next

Health Benefits and Health Savings Accounts page loads

Lists all available health plans for each plan year

Select health plan (e.g. Common Ground IYC Health Plan 2025)

Click "Next" button

Health Plan and HSA Confirmation

Confirmation page loads

Indicates plan acceptance and plan selected

Displays covered individuals

- Can add dependents

Click “Next” button to continue

Benefitplace

Company: SWI Training Sponsor - State

Ben Johnson2 (BENJ2102)
325-01-2102 | ben.johnson@gmail.com

CURRENT BENEFITS
Health Benefits and Health Savings Account 2025

Medical Plan	Status
Common Ground: IYC Health Plan 2025	Accepted

Persons Covered
Choose who you want to cover

Covered	Name	Relationship	
<input checked="" type="checkbox"/>	Ben Johnson2	Subscriber	
<input checked="" type="checkbox"/>	Billy Bob Johnson2	Child	Remove from coverage

[Add Dependent](#)

[Next](#)

Additional Health Insurance

Persons Covered

Name
Ben Johnson2
Billy Bob Johnson2

Coverage Level

Current Coverage - Individual
Requested Coverage - Family -- Pending Approval

Additional Insurance

*Currently, do any of the persons covered under this benefit have other health insurance?
Do not include GHC-EC medical insurance that the employee currently has through SWI Training Sponsor - State.

Yes, and I have all the required information: Policy Number, Policyholder, Carrier's Name, and Effective Date.

Yes, but I do NOT have all the required details.

No, neither the employee nor any dependent has had health insurance.

Next

System asks about additional insurance

Pending status for family plan

Additional insurance includes both member and dependents

Make selection and click "Next" button

Uniform Dental & Flexible Spending Account

Uniform Dental enrollment

Flexible Spending Account (FSA) enrollment

Decline and click “Next” button

Benefitplace

Company: SWI Training Sponsor - State

Ben Johnson2 (BENJ2102)

325-01-2102 | ben.johnson@gmail.com

Plan

***Select A Plan**

Health Care Flexible Spending Account (FSA) 2025

Not compatible with Health Savings Account

Decline Coverage

Decline coverage for this person

Next

Selections Summary

Summary of selections will load

Health plan, covered individuals, coverage level, etc.

Click "Save changes" button

The screenshot shows the Benefitplace interface for Ben Johnson2. The main content area displays the 'Enrollment Summary' for the 'Health Benefits and Health Savings Account 2025'. A table lists the medical plan details:

Medical	Status	Action	Semi-Monthly Premium Cost Summary												
Medical	Accepted	Edit													
Plan	Common Ground: IYC Health Plan 2025	Edit													
Persons Covered		Edit													
<table border="1"><thead><tr><th>Name</th><th>Relationship</th><th>Employer Cost</th><th>Employee Cost</th></tr></thead><tbody><tr><td>Ben Johnson2</td><td>Subscriber</td><td>\$800.00</td><td>\$800.00</td></tr><tr><td>Billy Bob Johnson2</td><td>Child</td><td></td><td></td></tr></tbody></table>				Name	Relationship	Employer Cost	Employee Cost	Ben Johnson2	Subscriber	\$800.00	\$800.00	Billy Bob Johnson2	Child		
Name	Relationship	Employer Cost	Employee Cost												
Ben Johnson2	Subscriber	\$800.00	\$800.00												
Billy Bob Johnson2	Child														
Coverage Level	Current Coverage - Individual Requested Coverage - Family -- Pending Approval														

At the bottom of the enrollment summary, there are three buttons: 'Save changes' (highlighted with a blue box), 'Save and go to benefits', and 'Cancel'.

New Hire Supplemental Enrollment

Enrollment process is similar to health

- Select plan (if applicable)
- Select covered individuals

Supplemental benefits enrolled through My Insurance Benefits:

- Vision
- Dental (not UDB - Uniform Dental Benefit)
- Accident plan
- Pre-tax savings accounts (State)
- Life
- Income Continuation (ICI)

Can only enroll if offered

HR Admin Add Dependent

Reference: *My Insurance Benefits HR
Administration Guide*
Ch. 7: *Dependent Management & Verification*



Open Member Record to Add Dependent

Reminder: Members should add own dependents

Open member record

Click on “Dependents” button

The screenshot displays the Benefitplace interface for a member named Ana Perez1 (ANAP1101). The interface includes a navigation sidebar on the left with options like Home, Employee, Data & Reporting, Targeted Messages, Resources, and Group Settings. The main content area shows the member's profile, a list of tasks (Ana has 0 pending tasks), and a Benefits Snapshot section. The 'Medical' benefit is highlighted, showing details for Aspirus: IYC Health Plan 2025 | Family | Effective as of 01/01/2025. Other benefits listed include Pharmacy (Navitus Pharmacy 2025 | Family | Effective as of 01/01/2025), Wellness Program (Wellness Program 2025 | Individual + Spouse | Effective as of 01/01/2025), and Administrative Fee (Administrative Fee 2025 | Individual | Effective as of 01/01/2025). The 'Dependents' button in the sidebar is highlighted with a red box, and a red arrow points from the text 'Click on “Dependents” button' to it.

View Dependents in Member Record

The screenshot shows the Benefitplace interface for a member record. The member is Ana Perez1 (ANAP1101), with contact information 525-01-1101 and ana.perez@gmail.com. The 'Dependents' section is highlighted in the left sidebar. The dependent list shows Jose Perez1 as the Spouse, with a status of 'Verified, Covered'. Below the list is a button labeled '+ Add another dependent'.

Member's dependents will load
(if they have any)

Dependents' info:

- Name
- Relationship
- Status

Click "Add another dependent"
button

Add New Dependent Tool

Screen loads to add dependent

Fill out all required fields *

When finished, click "Save" button

Benefitplace

[Back to employees](#)
Company: SWI Training Sponsor - State

Ana Perez1 (ANAP1101)
525-01-1101 | ana.perez@gmail.com

Dependents

Add new dependent
Enter new dependent's information below

Personal Information

First Name*

Middle Name

Relationship*

Sex*

Date of Birth*

New Dependent Now Added

Benefitplace

Home
Employees
Data & Reporting
Targeted Messages
Resources
Group Settings

[Back to employees](#)
Company: SWI Training Sponsor - State

Ana Perez1 (ANAP1101)
525-01-1101 | ana.perez@gmail.com

Overview
Benefit details
Dependents
Documents
Interactions
Employee history

EMPLOYEE REPORTS
Employee Detail Report
Employee Benefit Summary Report

Dependents

- Jose Perez1**
Spouse
Status: ✔ Verified, ✔ Covered
- Carmen Maria Perez1**
Child
Status: ✘ Not verified, ✘ Not Covered

[+ Add another dependent](#)

Member's dependents will load
(if they have any)

Dependents' info:

- Name
- Relationship
- Status

Status "Not Verified" & "Not Covered"

Enrollment for Dependents

To receive coverage, dependents must be enrolled in benefits

- Someone must enroll the dependents
- Dependents are not enrolled if just added to member record

Member or HR Admin can enroll dependents

- Completed after enrolling member
- Remember that dependents can be enrolled in different benefits

Dependent relationship requires proper documentation

- Example: birth certificate required for parent-child relationship

Touchpoint – Questions?



- Member search
- New hire enrollment (health, HSA, supplemental)
- New hire dependent enrollment



Support Plan for DOA



Support Plan for DOA – Data Corrections



Create Jira Ticket for Data Corrections that cannot be passed on the 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



Designated Agency-Based
DPM staff will create an Ivanti
ticket
(if needed)



ETF triages the ticket and Case
Manager follows up with
Agency & DOA

*Throughout this process, DOA can view progress to resolution via Ivanti
or call your Case Managers at 1-877-533-5020 (option 2)*

IAS Resources



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 WI Member Guide* (ET-1109)

ETF Website Employer Insurance

- *Employer Transaction Application (ETA) Guide* (ET-1113)
- *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 and Answers

Practical Exercise

- Log in and navigate system
- Search member
- Enroll member



Training Environment Quirks

Training environment is slower than production

- Built as State Employer with active employees

Logging in might take more than one attempt

- Check spacing and spelling

Multiple methods to complete same task

- Method you're given is intentional

For pop-up tour, click "don't show me again" if desired

Members (and premiums) are all fictitious

- Dozens of same members with different numbers added to names

"Demographic Sync Error" appears when adding numbers to names

- Training quirk: Ignore it (won't affect training)

IAS 200: Practical Exercise

Open Two Documents:

- Practical Exercise Log-In (Excel doc)
- IAS 200 Practical Exercise (pdf doc)

Log-In Template:

- URL for training environment
- Find row with your name
- Same row has assigned HR Admin username

IAS 200 Practical Exercise Worksheet

	A	B	C	D	E	F
1	Name	Link	HR Admin Name	Password	Member A	Member B
2	Trainer Jake - AM	https://eetest-intc.benefitfocus.com/go/bfi	HRADMINSTATE001	Welcome1	Ben Johnson1	Dave Jones1
3	Trainer Jen - AM	https://eetest-intc.benefitfocus.com/go/bfi	HRADMINSTATE002	Welcome1	Ben Johnson2	Dave Jones2
4	Trainer Jen - AM	https://eetest-intc.benefitfocus.com/go/bfi	HRADMINSTATE003	Welcome1	Ben Johnson3	Dave Jones3
5	Trainer Jen - AM	https://eetest-intc.benefitfocus.com/go/bfi	HRADMINSTATE004	Welcome1	Ben Johnson4	Dave Jones4
6	Trainer Caleb - AM	https://eetest-intc.benefitfocus.com/go/bfi	HRADMINSTATE005	Welcome1	Ben Johnson5	Dave Jones5
7	Trainer Caleb - PM	https://eetest-intc.benefitfocus.com/go/bfi	HRADMINSTATE006	Welcome1	Ben Johnson6	Dave Jones6
8	Trainer Katherine - AM	https://eetest-intc.benefitfocus.com/go/bfi	HRADMINSTATE007	Welcome1	Ben Johnson7	Dave Jones7
9	Trainer Katherine - PM	https://eetest-intc.benefitfocus.com/go/bfi	HRADMINSTATE008	Welcome1	Ben Johnson8	Dave Jones8
10	Moderator 1 - AM	https://eetest-intc.benefitfocus.com/go/bfi	HRADMINSTATE009	Welcome1	Ben Johnson9	Dave Jones9
11	Moderator 2 - PM	https://eetest-intc.benefitfocus.com/go/bfi	HRADMINSTATE010	Welcome1	Ben Johnson10	Dave Jones10

IAS 200 Practical Exercise (Active)

TASK 1: Log into the system and follow pop-up navigation tour.

1. Navigate to the Training Portal:
<https://eetest-intc.benefitfocus.com/go/stateofwisconsin>.
2. Enter the username assigned to you in the username field.
 - a. Example: HRADMINSTATE### (NOTE: not case sensitive).
3. Enter Welcome2 in the password field.
4. Click "Log in."
5. Once you've logged in, click "Take the Tour now."
 - a. **NOTE: The pop-up tour may not launch. Follow along if this happens.**
6. Review the Profile Pop-up and click "next."
7. Review the Benefit participation widget Pop-up and click "next."
8. Review the Employees Pop-up and click "next."
9. Review the Data & Reporting Pop-up and click "next."
10. Write "Task 1 Complete" in the Teams chat when finished.

Task 1 – Log in and Follow Navigation Tour

Follow directions

Ask questions in
Teams chat

Thumbs up when
complete

IAS 200 Practical Exercise

TASK 1: Log into the system and Follow Pop-up Navigation Tour

- A. Navigate to the Test Portal located here: <https://eetest-intc.benefitfocus.com>
- B. Enter the username assigned to you in the username field (Example: HRADMINSTATE???)
Not case sensitive)
- C. Enter Welcome1 in the password field
- D. Click “Log in”
- A. Once you’ve logged in, click “Take the Tour now”
- B. Review the Profile Pop-up and click “next”
- C. Review the Benefit participation widget Pop-up and click “next”
- D. Review the Employees Pop-up and click “next”
- E. Review the Data & Reporting Pop-up and click “next”

CAUTION: Search Members with Care

You will search and process members

Find your assigned members

- Find member whose last name matches your username with which you logged in
- Ex: HRADMINSTATE001 = John Smith1 (may also be John Smith001)
 HRADMINSTATE014 = John Smith14 (may also be John Smith014)

Use “your” member

Task 2 – Locate and Review Coverage

TASK 2: Locate and review the current coverage.

1. Type the name Ana Perez in the “search by name or SSN” field and press enter or click go.
 - a. Find member whose last name matches your username with which you logged in.
 - b. Example:
HRADMINSTATE001 = Ana Perez1 (may have to check for Ana Perez001)
HRADMINSTATE028 = Ana Perez28 (may have to check for Ana Perez028).
2. Click the name Perez, Ana (DOB 01/01/1990).
3. Review the Employee Overview Pop up and click “Take the tour now.”
4. Review the Secondary Navigation pop up and click “next.”
5. Review the Manage employee dropdown Pop-up and click “next.”
6. Click “Benefit Details.”
7. Use the Benefit details screen to answer the following questions:
8. What Medical plan is Ana subscribed to? _____
9. How many persons are covered on this medical plan? _____
10. Does the Perez family have the Uniform Dental Benefit? Yes/no
11. Is Ana contributing to an FSA? Yes/no
12. How many Life insurance coverage units does Ana carry?
1x | 2x | 3x | 4x | 5x

Follow directions

Ask questions in
Teams Q&A

Thumbs up when
complete

Task 3 – HR Admin Enroll in Coverage

Follow directions

Ask questions in
Teams chat

Thumbs up when
complete

Task 3: HR Admin enroll in coverage.

1. Search for Ben Johnson.
 - a. Find member whose last name matches your username with which you logged in.
 - b. Example:
HRADMINSTATE001 = Ben Johnson1 (may have to check for Ben Johnson001).
HRADMINSTATE028 = Ben Johnson28 (may have to check for Ben Johnson028).
2. Click "get started" in the benefits Snapshot section under the tasks section.
3. Click "enroll in benefits" on the Benefit details page.
4. Select the "Aspirus: IYC Health Plan 2025" radial button and click the "next" button at the bottom.
5. Click "next" on the Persons Covered screen.
6. Indicate "No, neither the employee nor any dependent has had health insurance" and click "next."
7. Select "Uniform Dental 2025" and click "next."
8. Decline coverage for FSA and click next.
9. Click "save changes."
10. Write "Task 3 Complete" in Teams chat when finished.

Touchpoint – Questions?



- Logging in and navigation
- Searching member
- Enrolling member



Next steps

- Feedback Survey
- IAS 201: Life Events and Career Transitions



Thank you



etf.wi.gov



ETF E-mail Updates



1-877-533-5020

