



**IAS 201:**

# **HR Admin (Administrator) Training**

Life events and Career Transitions



# Technology Check

---



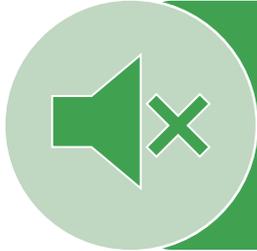
Can you see the  
screen?



Can you hear  
the speaker?

# Ground Rules

---



Mute yourself throughout training



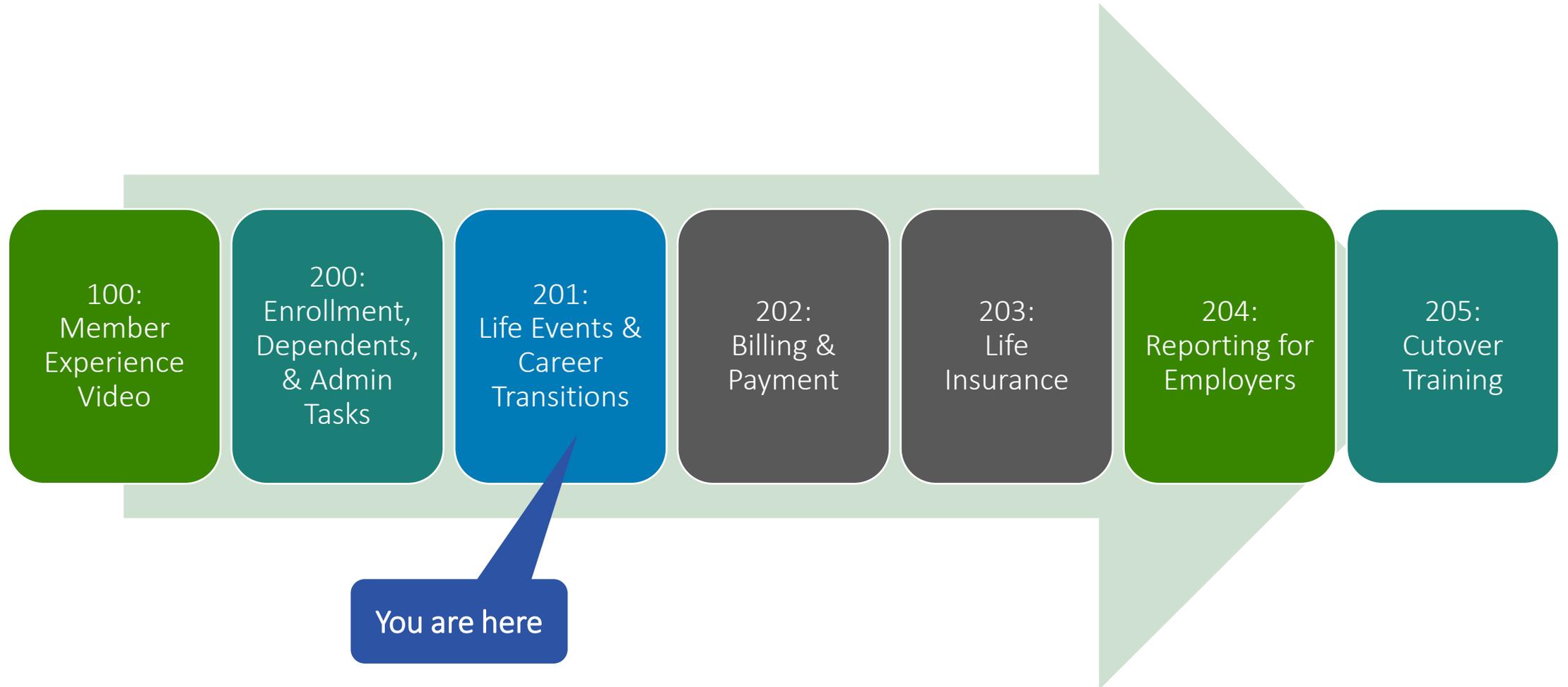
Ask questions via MS Teams chat feature



Cameras off

# 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

---

Describe life event process

Change benefits due to life events

Explain date rules

Process leave of absence (LOA)

Process transfers and rehires

Process retirees

Understand COBRA & My Insurance Benefits

# Describe Life Event Process

---



# Life Event Companion Guide

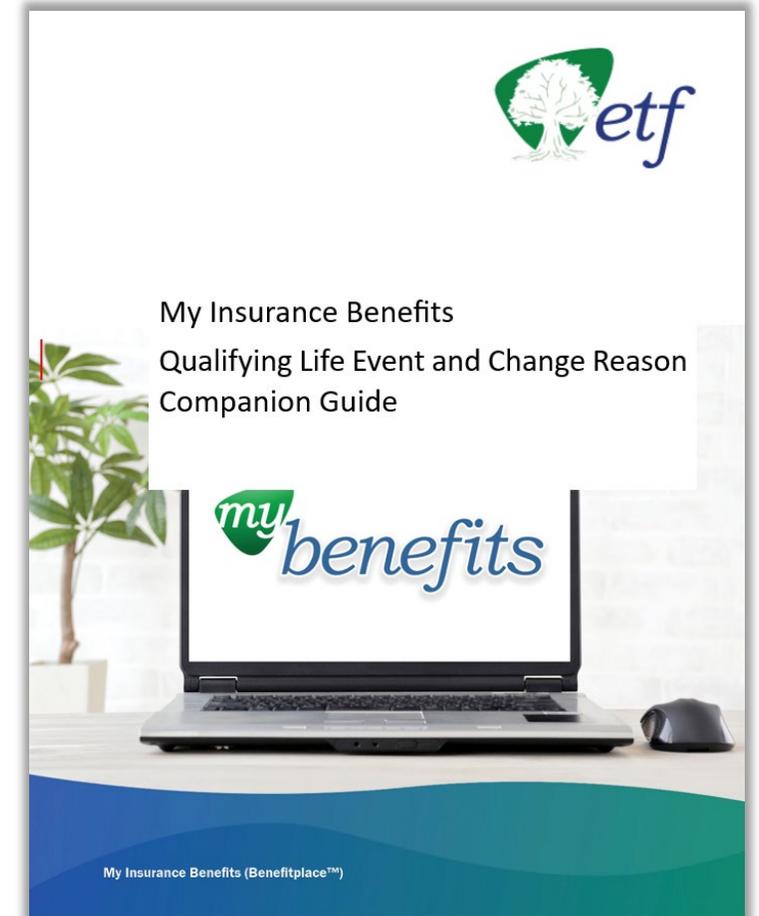
All events listed in *Companion Guide*

65 total life events listed by type:

- 11 Standard life events
- 6 Work change life events
- 39 HR Admin-only life events
- 9 Automated Appeals life events
- One page for each QLE

Common errors and how to troubleshoot

[IAS Resource Page](#)



# Employer IAS Procedures (ET-1111)



## Employer Insurance Administration System (IAS) Procedures (ET-1111)

Department of Employee Trust Funds  
P.O. Box 7931  
Madison, WI 53713

Employer Communications Center  
1-877-533-5020

etf.wi.gov

ET-1111 (REV 2/6/2026)

Page 1 of 156

Resource for various employer processes

### Topics:

- Multiple systems
- Complex & rare situations
- Open Enrollment
- Errors, etc.

Format: Background, Resources, Step-by-Step Guidance

Updated regularly with employer newsletters

[IAS Resource Page](#)

# Life Events Background

## Definition: Qualifying Life Event

Event that qualifies members to change benefit elections

Members cannot normally change benefits outside OE

## Changing benefit examples

Changing Single to Family

Changing Health Plans

Changing Levels of Life Insurance Coverage

## Source of initiating benefit changes varies

Active members can initiate most events in My Insurance Benefits

Some life events require additional steps by HR Admin

# Life Events VS Change Reasons

---

All life events are change reasons in My Insurance Benefits

Not all change reasons are life events (e.g. “Disenroll from HDHP due to ineligibility”)

Analogy: All squares are rectangles, but not all rectangles are squares

# Active Member: Typical Life Event Process Flow

---



- Has life event
- Enters life event into My Insurance Benefits
- Adds/removes dependent(s)
- Uploads supporting documents

- Verifies dependents first
- Verifies documents
- Verifies life event is correctly keyed

- Assists employers
- Audits employer tasks
- Coordinates support with BenefitFocus (vendor)

# Active Member Example – Birth

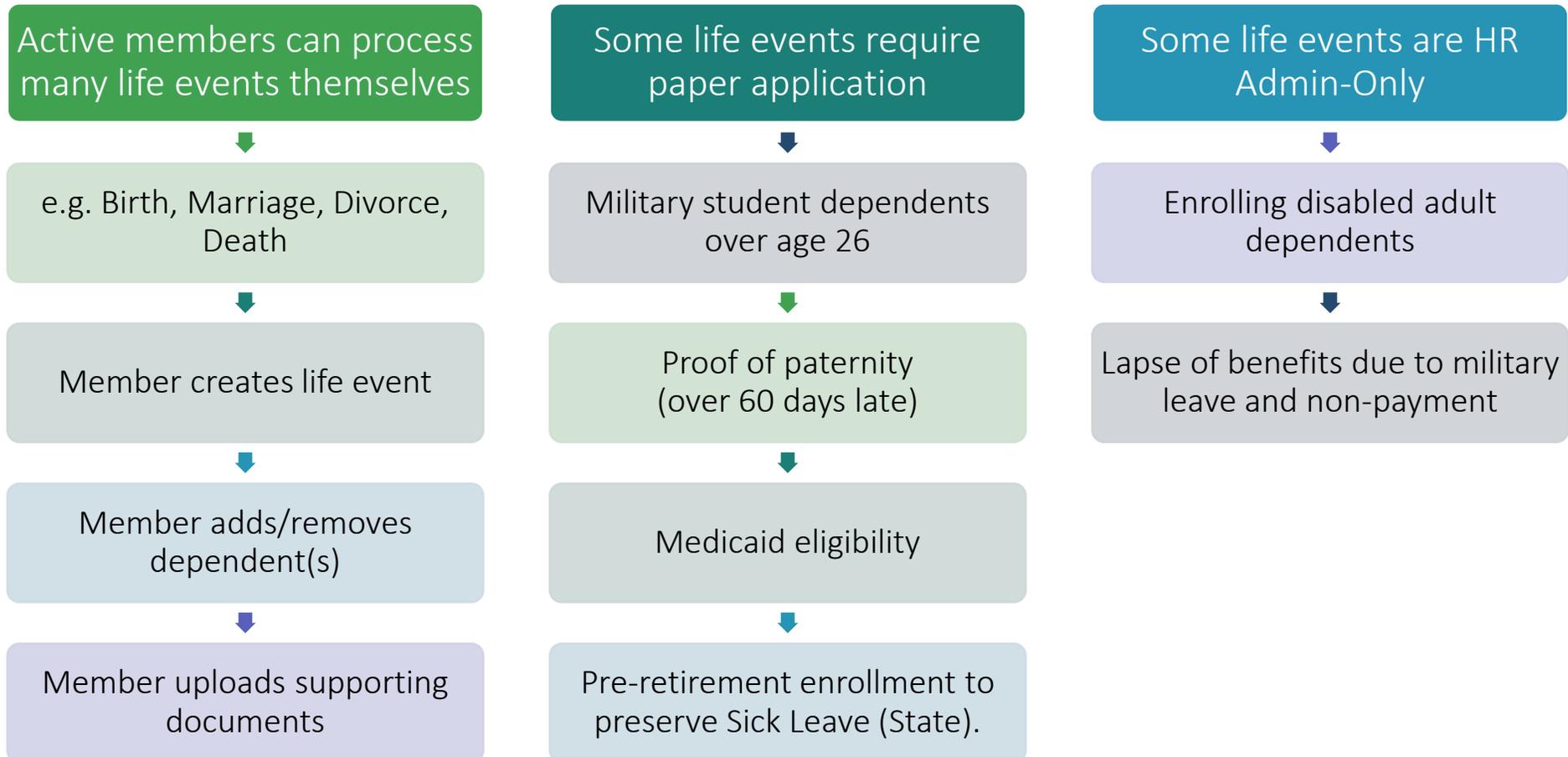


- Child born
- Enters “Birth” event into system
- Adds baby as dependent
- Enrolls baby
- Uploads birth certificate copy (pending)
- Inputs SSN (when available)

- Verifies new dependent
- Verifies birth certificate
- Verifies birth life event
- Changes health plans if member requests

- Assists employer
- Conducts audits
- Coordinates support with BenefitFocus (vendor)

# Who Makes Life Event Changes?



# Life Events to Change Health Plans: Multi-Step Process



Life events that allow health plan changes:

- Adoption, Birth, Guardianship, National Medical Support Notice, Marriage, Divorce, Loss of other coverage, & Moving from service area



Members cannot enter most health plans changes in system

- Reminder: Health plans are insurance carriers
- Member can add QLE and add/remove dependents, but cannot change health plans
- Exception: Moving from service area → Member can change plans

**1 / day**

Employer should not approve more than 1 QLE / day for member

- Example: Approve divorce QLE one day → health plan change another day

# Example: Life Events to Change Health Plans

Step 1: Member → adds life event in My Insurance Benefits



Step 2: Member → adds/removes dependent in My Insurance Benefits



Step 3: Member → requests health plan change to HR Admin (established internally)



Step 4: HR Admin → approves life event in My Insurance Benefits



Step 5: HR Admin → Initiates QLE to change health plans *on a different day*



Step 6: Member → selects new health plan within 30 days of life event

# Changing Health Plans Effective Dates

---

Two effective dates  
from single life  
event

Effective Date One:  
Day of life event

Effective Date Two:  
1<sup>st</sup>/mo. following  
event date

Example:  
Birth on 3/17

Effective Date One:  
3/17 Baby added to  
coverage

Effective Date Two:  
4/1 Health plan  
changes

# Life Event Documents

---

Life events require appropriate documentation:

- [ETF Acceptable Documents webpage](#)
- Examples: Birth certificates, Divorce decrees, etc.
- CCAP screenshot ≠ divorce decree
- Errors → Employer & several ETF business units fixing

Documents must be associated with life events

- Member role → System prompts them
- HR Admin role → Must be done manually
- HR Admins must still upload document and associate QLE even if acting on behalf of member

Importance of timeliness

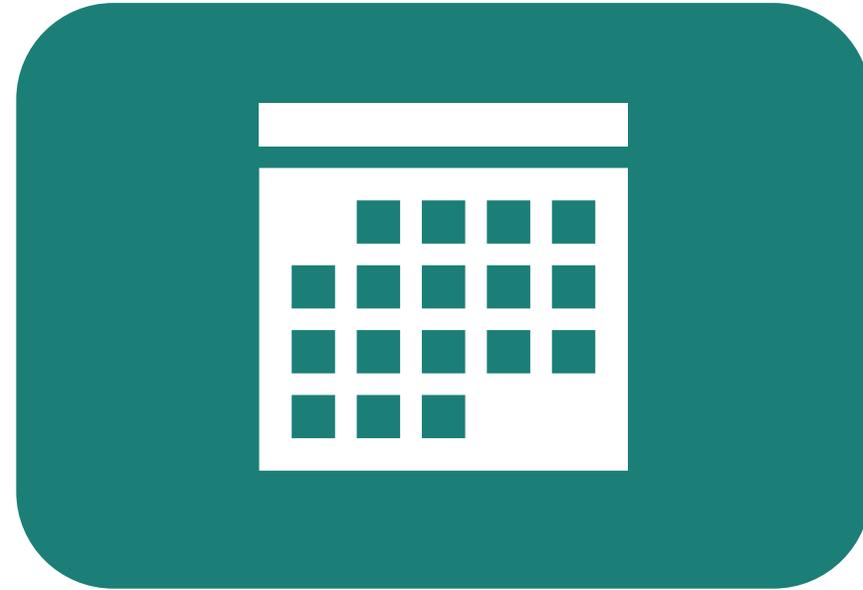
- Coverage lapses
- Invoice accuracy
- Payroll accuracy

# Reporting Employee Deaths

---



Report deaths ASAP



Use date of death  
(not last day worked)

# Change to Future State: Active Deaths

## Current State:

- Deceased member's family reports death to employer
- Employer tells family to contact ETF
- ETF Call Center creates service request for ETF units
- ETF sets up survivor contract

## Future State:

- Deceased member's family contacts employer and ETF
- Employers process employee death in PeopleSoft → terms benefits
- Deceased member's coverage terminates end of month

Use ET-1111 for processing deaths

# Life Events Crossing Plan Years

Life events that occur in year prior to entry into system

- Adoption, Birth, Guardianship, Legal Custody, Marriage, Loss of Other Coverage, Now Eligible for Other Coverage, Death of Dependent

Example:

- Dependent born December 28
- Member adds January 5
- Effective date is January 1 → No coverage December 28-31.
- Member cannot add to prior year coverage

Employer must carefully review QLEs near end of year & beginning of next

Employer can correct up to 65 days → ETF must correct after 65 days

# Touchpoint – Questions?

---



# Change Benefits due to Life Events

---

Reference:

*My Insurance Benefits Qualified Life Event and  
Change Reason Companion Guide, Chapter 8*



# Member Elections Disclaimer

---



Members should enroll themselves & add dependents



HR Admins may enroll or add dependents – not preferred



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

# HR Admins Initiating Benefit Change

Search member

Multiple ways to search  
(e.g. SSN, name)

The screenshot displays the Benefitplace HR system interface for the SWI University of Wisconsin System. The top navigation bar includes the Benefitplace logo, a user profile for Jason Spielbauer, and buttons for 'View all employees' and 'Add a new employee'. A search bar is prominently featured, highlighted with a green box, and contains the text 'Search by Name or SSN'. Below the search bar, the dashboard is divided into several sections: 'To-do list' with a 'View by:' dropdown and a message to 'Please select a category from the above dropdown.'; 'Benefit Participation' with a date range dropdown set to '01/01/2024 - 12/31/2024' and a category dropdown set to 'Medical', accompanied by a bar chart showing a value of 10,889; and 'Additional tools' with links for 'Auto Enrollment Summary', 'Document Center', 'Find Medicare Eligible', and 'Health Statement Approval Manager'. A vertical sidebar on the left contains navigation icons for Home, Employees, Data & Reporting, Content Manager, Targeted Messages, Resources, and Group Settings.

# Member Profile

**Benefitplace** etf HR AdminState001

[Back to employees](#)  [Go](#)

Company: SWI Training Sponsor - State

**Ana Perez1** (ANAP1101) [Manage Employee](#)

525-01-1101 | ana.perez@gmail.com

**Overview**

Ana has 0 pending tasks

### Benefits Snapshot

<b>Medical</b> <a href="#">Edit</a>	<b>\$800.00</b> Semi-Monthly
Aspirus: IYC Health Plan 2025   Family   Effective as of 01/01/2025	
<b>Pharmacy</b> <a href="#">Edit</a>	<b>\$100.00</b> Semi-Monthly
Navitus Pharmacy 2025   Family   Effective as of 01/01/2025	
<b>Wellness Program</b> <a href="#">Edit</a>	<b>\$1.00</b> Semi-Monthly
Wellness Program 2025   Individual + Spouse   Effective as of 01/01/2025	
<b>Administrative Fee</b> <a href="#">Edit</a>	<b>\$1.00</b> Semi-Monthly
Administrative Fee 2025   Individual   Effective as of 01/01/2025	

**+13 Additional Benefits** [>](#)

Member profile loads

Benefits Snapshot displays member's current benefits

Click "Benefit details" button to edit benefits

# Benefits Details

Member's  
Benefit Details  
load

Click "Edit  
benefits"  
button

The screenshot shows the Benefitplace interface for an HR administrator. The main content area displays the 'Benefit details' for Ana Perez1 (ANAP1101). The page title is 'Health Benefits and Health Savings Account 2025'. A table lists the following details:

Plan	Aspirus: IYC Health Plan 2025
Persons Covered	Ana Perez1 (Subscriber) Effective 01/01/2025 Jose Perez1 (Spouse) Effective 01/01/2025
Coverage Level	Family
Additional Insurance	None

Below the table, there are two status indicators: 'Medical Opt-Out Incentive' with a status of 'Accepted' and 'Medical Opt-Out Incentive' with a status of 'Not Eligible'. A green callout box highlights the 'Edit benefits' button in the top right corner of the main content area.

# Edit Due to Change Reason (Life Event)

**Benefitplace** etf HR AdminState001

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

**CURRENT BENEFITS**

## Health Benefits and Health Savings Account 2025

### Enrollment Summary

Medical Changes Requiring a Change Reason

<b>Medical</b>	Accepted	<b>Semi-Monthly Premium Cost Summary</b>
<b>Plan</b>	Aspirus: IYC Health Plan 2025	Total Premium \$1,600.00
		Employer Cost \$800.00
		Employee Cost \$800.00

**Persons Covered**

Name	Relationship	Effective Date
Ana Perez1	Subscriber	01/01/2025
Jose Perez1	Spouse	01/01/2025

**Coverage Level** Family

Enrollment Summary loads

Medical changes require Change Reason (life event)

Click "Edit due to change reason" button

# Selecting Change Reason (Life Event)

Reason for Medical Change drop-down loads

Click drop-down “Select a new change reason”

List of change reasons loads

Select “Birth” as change reason

Click “Next” Button

The screenshot displays the Benefitplace interface for an employee named Ana Perez1. The page title is "Health Benefits and Health Savings Account 2025". Under the "CURRENT BENEFITS" section, there is a "Reason for Medical Change" section with a dropdown menu. The dropdown menu is open, showing a list of change reasons, with "Birth" selected. A "Next" button is visible at the bottom of the form. The interface includes a sidebar with navigation options like Home, Employees, Data & Reporting, Targeted Messages, Resources, and Group Settings. The footer contains copyright information and contact details for Benefitfocus.

# Reason for Medical Change Details

Benefitplace

Company: SWI Training Sponsor - State

Search by Name or SSN

Ana Perez1 (ANAP1101)

525-01-1101 | ana.perez@gmail.com

Manage Employee

Overview

Benefit details

Dependents

Documents

Interactions

Employee history

EMPLOYEE REPORTS

Employee Detail Report

Employee Benefit Summary Report

CURRENT BENEFITS

Health Benefits and Health Savings Account 2025

**\*Reason for Change**

You have selected a Birth change reason.

You are permitted to perform the following adjustments to your insurance coverage as a result of this life event:

- You CANNOT cancel your coverage.
- You are NOT permitted to change your plan.
- You may change your coverage level.
- You can add dependents to your existing coverage.
- You CANNOT cancel coverage for any dependents at this time.

Do you wish to continue with this change?

Yes

No

Enter date of birth\*

date of birth

When were you notified about this life event?\*

Enter a date

Previous

Next

Reason for Change details loads

Permissions listed for life event

Confirmation to continue

Enter event date information

Click Next button

# Enrollment Summary with Change Reason

Enrollment Summary loads

Change reason listed

Click Persons Covered "Edit"  
to add new dependent

**Benefitplace** vetf HR AdminState001

Company: SWI Training Sponsor - State

**Ana Perez1** (ANAP1101)

525-01-1101 | ana.perez@gmail.com

**Enrollment Summary**  
You may edit this benefit by clicking on the section's corresponding Edit button.

**Medical**

**Change Reason** Birth on 03/17/2025

**Medical** Accepted

**Plan** Aspirus: IYC Health Plan 2025

**Persons Covered**

Name	Relationship	Effective Date
Ana Perez1	Subscriber	01/01/2025
Jose Perez1	Spouse	01/01/2025

**Coverage Level** Family

**Semi-Monthly Premium Cost Summary**

Total Premium \$1,600.00  
Employer Cost \$800.00  
Employee Cost \$800.00

# Add Dependent for Life Event

Benefitplace

Company: SWI Training Sponsor - State

Search by Name or SSN

Ana Perez1 (ANAP1101)

525-01-1101 | ana.perez@gmail.com

Manage Employee

Overview

Benefit details

Dependents

Documents

Interactions

Employee history

EMPLOYEE REPORTS

Employee Detail Report

Employee Benefit Summary Report

CURRENT BENEFITS

Health Benefits and Health Savings Account 2025

Reason for Change: Birth on 03/17/2025

Medical: Accepted

Plan: Aspirus: IYC Health Plan 2025

Persons Covered

Choose who you want to cover

Covered	Name	Relationship	Effective Date
<input checked="" type="checkbox"/>	Ana Perez1	Subscriber	01/01/2025
<input checked="" type="checkbox"/>	Jose Perez1	Spouse	01/01/2025

Add Dependent

Next

Persons Covered loads

Only member and current dependents listed

Click "Add Dependent"

# Dependent Details

Add dependent tool loads

Fill in required fields

Race & ethnicity required by CMS to ask; members not required to respond

Click "Save" button

**Persons Covered**  
Add Dependent

If the relationship of the new dependent is not listed, you may need to update the Coverage Level.

First/Middle/\*Last: Max [ ] [ ] Perez1 [ ]

Court Order Dependent: No [ ]

Relationship: Child [ ]

Sex: Male [ ]

Date of Birth: 03/17/2025 [ ]

SSN: [ ]

Race (formal response):  
American Indian or Alaskan Native  
Black or African American  
Other Pacific Islander  
White

Ethnicity (formal response):  
Not of Hispanic, Latino/a or Spanish Origin  
Puerto Rican  
Another Hispanic, Latino or Spanish Origin  
Mexican, Mexican American, Chicano/a

Address: Use Employee's Standard Address [ ]

Buttons: Cancel, Save and Add Another, Save

# New Dependent Covered

**Benefitplace** etf HR AdminState001

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

**CURRENT BENEFITS**

### Health Benefits and Health Savings Account 2025

Reason for Change: Birth on 03/17/2025

Medical: Accepted

Plan: Aspirus: IYC Health Plan 2025

**Persons Covered**

Choose who you want to cover

Covered	Name	Relationship	Effective Date
<input checked="" type="checkbox"/>	Ana Perez1	Subscriber	01/01/2025
<input checked="" type="checkbox"/>	Jose Perez1	Spouse	01/01/2025
<input checked="" type="checkbox"/>	Max Perez1	Child	03/17/2025

Persons Covered  
reloads

New dependent added  
to Persons Covered

Click Next button

# Additional Insurance?

## Additional Insurance question loads

- For coordination of benefits and because not allowed for HDHP (state)

Select “No” and click “Next” button

**Additional Insurance**  
\*

Currently, do any of the persons covered under this benefit have other health insurance?  
Do not include Aspirus 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**

# Enrollment Summary with New Dependent

**Benefitplace**  
Company: SWI Training Sponsor - State  
Search by Name or SSN

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

**CURRENT BENEFITS**  
Health Benefits and Health Savings Account 2025

**Enrollment Summary**  
You may edit this benefit by clicking on the section's corresponding Edit button.

**Medical**

Change Reason	Birth on 03/17/2025	Edit
Medical	Accepted	
Plan	Aspirus: IYC Health Plan 2025	

**Semi-Monthly Premium Cost Summary**

Total Premium	\$1,600.00
Employer Cost	\$800.00
Employee Cost	\$800.00

**Persons Covered**

Name	Relationship	Effective Date
Ana Perez1	Subscriber	01/01/2025
Jose Perez1	Spouse	01/01/2025
Max Perez1	Child	03/17/2025

Coverage Level: Family

**Save changes** | Save and go to benefits | Cancel

Enrollment Summary reloads

New dependent covered

Click "Save Changes" button

# Document Manager

Document Manager loads

System explains supporting document requirement

Click "Upload a Document" button

**Benefitplace**

Company: SWI Training Sponsor - State

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

Manage Employee

**Document Manager**

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

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

+ Add Document

Search by:  
 Employee name  Document name

Begin typing search Search

per page 10

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

Document is awaiting upload	03/19/2025
Dependent Name: Max Perez1	Perez1, Ana
For more information about required documentation, click here.	

Document Required

Upload a Document Associate an Existing Document

per page 10

# Adding Supporting Document

**Adding New Document**  
Please complete the information below.

**Browse for File \*** ⓘ  
File Chosen Max Perez Birth Cert.docx  
Hover over the (i) above to view accepted file types.

**Document name \***  
Max Perez1 Birth Cert

**Associate Document With \***  
ANAP1101 Search  
Ana Perez1 (ANAP1101)

**Category \***  
Birth Certificate

Hide from Employee

**Date**  
03/19/2025

**Description**  
[Empty text area]

**Notes** (ad hoc information; this will only be displayed to HR Admins)  
[Empty text area]

Cancel Save

The screenshot shows a web form titled "Adding New Document". A green box highlights the "Browse for File" section, the "Document name" field, the "Associate Document With" search section, the "Category" dropdown, the "Hide from Employee" checkbox, and the "Date" field. A blue box highlights the "Cancel" and "Save" buttons at the bottom of the form. Three callout boxes on the right provide instructions: "Adding New Document tool loads" (green), "Fill in required fields and upload document" (teal), and "Click Save button" (blue).

Adding New Document tool loads

Fill in required fields and upload document

Click Save button

# Approve Supporting Document

Document Manager reloads

Newly uploaded document appears

Click "Approve" button

Status changed to Approved

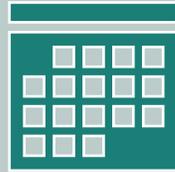
The screenshot displays the Benefitplace web application interface. The top navigation bar includes the company name 'Benefitplace', a search bar, and the user 'HR AdminState001'. The main content area is for 'Ana Perez1 (ANAP1101)'. The 'Document Manager' section shows a list of documents with a table of columns: Document Name, Date Created, Date Uploaded, Employee, and Sent on API. A document titled 'Max Perez1 Birth Cert' is highlighted, showing details like 'Dependent Name: Max Perez1' and 'Birth Certificate'. The 'Approve' button is highlighted with a red box, and a red arrow points from the text 'Click "Approve" button' to it. Another red arrow points from the text 'Status changed to Approved' to the 'Approve' button. The document status is 'Pending Approval'.

Document Name	Date Created	Date Uploaded	Employee	Sent on API
Max Perez1 Birth Cert	03/19/2025	03/19/2025	Perez1, Ana	Birth Certificate

# NOTE: Errors in My Insurance Benefits



My Insurance Benefits may generate event error alerts



System compares event date to keying date



When dates don't align with configuration, system generates error alerts



Examples:

- Too far in future
- Notification period has passed
- Event too far in past

If you get one of these errors, check *Life Event Companion Guide* and review dates

# Touchpoint – Questions?

---



# Explain Date Rules

---

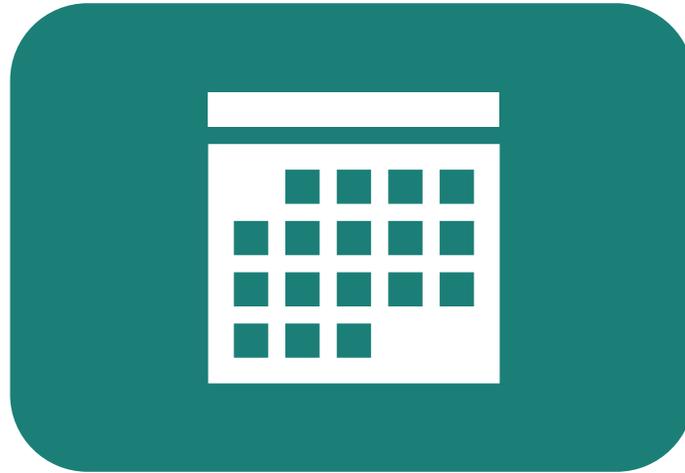


# ETF Date Rules

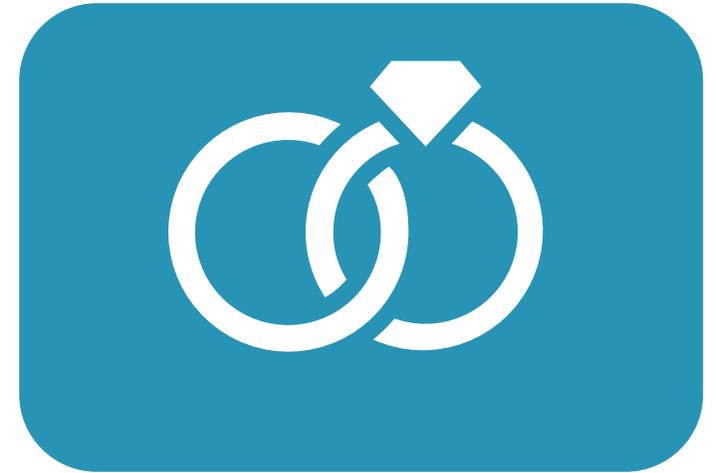
---



New hires  
(IAS 200)



Open enrollment  
(training closer to date)



Life Events

# Date Rules Definition

---

Definition: Rules for when coverage can be changed.

Examples:  
Coverage added,  
terminated,  
effective date, etc.

Different situations have different date rules.

Examples:  
New hires, open  
enrollment, birth,  
etc.

# Life Event Companion Guide & Date Rules

Guide explains life events detail

Table of Contents lists all life events

Each event has in-depth section with date rules

## 9.1.5. Marriage

When a member marries, their spouse and any stepchildren become qualified dependents on the day of the marriage.

### Who can create and use?

Both Members and HR Administrators can create and use this QLE.

### What documentation is required?

Documentation is required for this qualifying life event. Refer to ETF's website for specific information at [etf.wi.gov/life-events-guide](http://etf.wi.gov/life-events-guide).

### Dates and Timelines for Qualifying Life Event

Effective Date of New Enrollments	Date of Event
End Date of Cancellations	Not Applicable
Effective Date of Health Plan Change, if applicable	Plan change is effective the first of the month on/after the date of event*
Days for Member Notification	30 Days
Days for HR Administrator/ETF Notification	60 Days
Days for Future Dated Transaction, if allowed	No

### Ability to Change Coverage

Newly Elect Health?	Yes
Cancel Health?	No
Change Health Plans?	Yes *
Add or Cancel Uniform Dental?	Yes, Add only
Add or Cancel Supplemental Benefits	Yes
Ability to change FSA contribution?	Yes, Add, Increase or Decrease
Ability to change Dependent Care contribution?	Yes, Add, Increase or Decrease
Add or Increase Life Insurance?	Yes
Is Evidence of Insurability Required?	No, if selecting one (1) unit of life insurance ** EOI will <u>pend</u> for units beyond the 1 unit increase

### Coverage Change Limitations

- Retirees and Surviving Dependents cannot newly elect coverage but can add dependents to existing coverage.
- Members cannot change between Dental plans until the open enrollment period.
- New elections or increases for Life Insurance for Active Employees Only will be effective on the first of the month on or after the notification date. Later effective dates may apply in a scenario where EOI is required.

# Life Events with Date Rules

---

Marriage

Divorce

New dependent

Moving from  
service area

Lay off or leave of  
absence (LOA)

Death

Gain other  
eligibility

Lose other  
eligibility or  
employer  
premium  
contribution

Gain greater  
employer  
premium  
contribution

Active employee  
enroll before  
retirement\*

NOTE: Life event dates are not customizable—the exact dates must be input

# Life Event Enrollment & Cancellation Deadlines

Life events with 30-day deadlines:

- Marriage
- Divorce
- Gaining new dependent (changing health plans)
- Move from health plan service area
- Gaining eligibility for other coverage
- Losing eligibility for other coverage
- Gaining greater employer premium contribution
- Active employee enroll before retirement (file app *more than* 30 days)

Life events with 60-day health app enrollment deadlines:

- Divorce (cancellation)
- Gaining new dependent (not changing health plans)

Other deadlines:

- Death of Spouse or Dependent

NOTE: [Job aid](#) available for QLE effective dates

# Employee History Overview

## Info in employee's history

- Coverage over time
- New hire, life events, open enrollment
- Category changes (e.g. Protective from Non-Protective)

## Open from member record

## Point in time VS Timeline

Timeline:  
View when changes made & by whom

Benefitplace

State of Wisconsin [Back to employees](#) Search by Name or SSN or Employer ID or ETF N Go Sponsor Search

Home Employees Data & Reporting Message Center Resources Group Settings

Manage Employee

[Back to Employee History](#) [View in History of Changes](#) [Print timeline](#)

### Employee Timeline

View a summary of the transactions that occurred on or before the selected date

Select date: 02/18/2026

DEC 12  
4 benefits edited (by [redacted]) 12/12/2025 at 12:02 PM

NOV 04  
8 benefits declined and approved (by [redacted]) 11/04/2025 at 7:13 AM

JUL 15  
Updates to email address and app... ed (by DATASYNC) 07/15/2025 at 10:23 AM

# Employee History – Event Details

The screenshot displays the Benefitplace interface for the State of Wisconsin. The main content area is titled "Employee History" and shows a comparison of employee data between two states. The "Demographics" section is highlighted with a blue box. The "Results for" table shows the current state (November 10th, 2025, 8:32:35 am) and the previous state (November 7th, 2025, 4:05:46 pm). The "Personal Information" section is visible below, with red arrows pointing to the "Full Name" and "Date of Birth" fields in both states.

**Demographics**

**Persons**

- [Redacted]

**Attribute Groups**

- Personal Information
- Address
- Email Address Information
- Phone Numbers Information
- Student Information
- Emergency Contact Information
- Direct Deposit Information
- Work Information
- Custodian
- Categories
- Survey Details
- Medicare Information
- Medicare Payer Status

Results for	Current State: November 10th 2025, 8:32:35 am	Previous State: November 7th 2025, 4:05:46 pm
<b>Demographics</b>		
<b>Personal Information</b>		
Full Name	[Redacted]	[Redacted]
Date of Birth	[Redacted]	[Redacted]
SSN	***-**-****	***-**-****
ETF Member ID	[Redacted]	[Redacted]

Total number of benefits edited

Editor types

- Member, Employer, ETF, BenefitFocus, PeopleSoft

Categories affected

Two states: Current & Previous

Scroll down to compare changes

Job aid available

# Touchpoint – Questions?

---



# Processing Leave of Absence (LOA)

---



# ETA XML File

---

## What is it?

- Data file sent to My Insurance Benefits from employers' HR software (PeopleSoft)
- XML file sent daily

## XML file data

- New employees, terminations, employee demographics, FTE changes

Only Central Benefits uses ETA User Interface (UI)

# Leave of Absence (LOA) Overview



Use the ET-1111!

- Specific codes in ETA XML file
- Specific change reasons in My Insurance Benefits



Employee chooses whether to continue benefits or lapse coverage

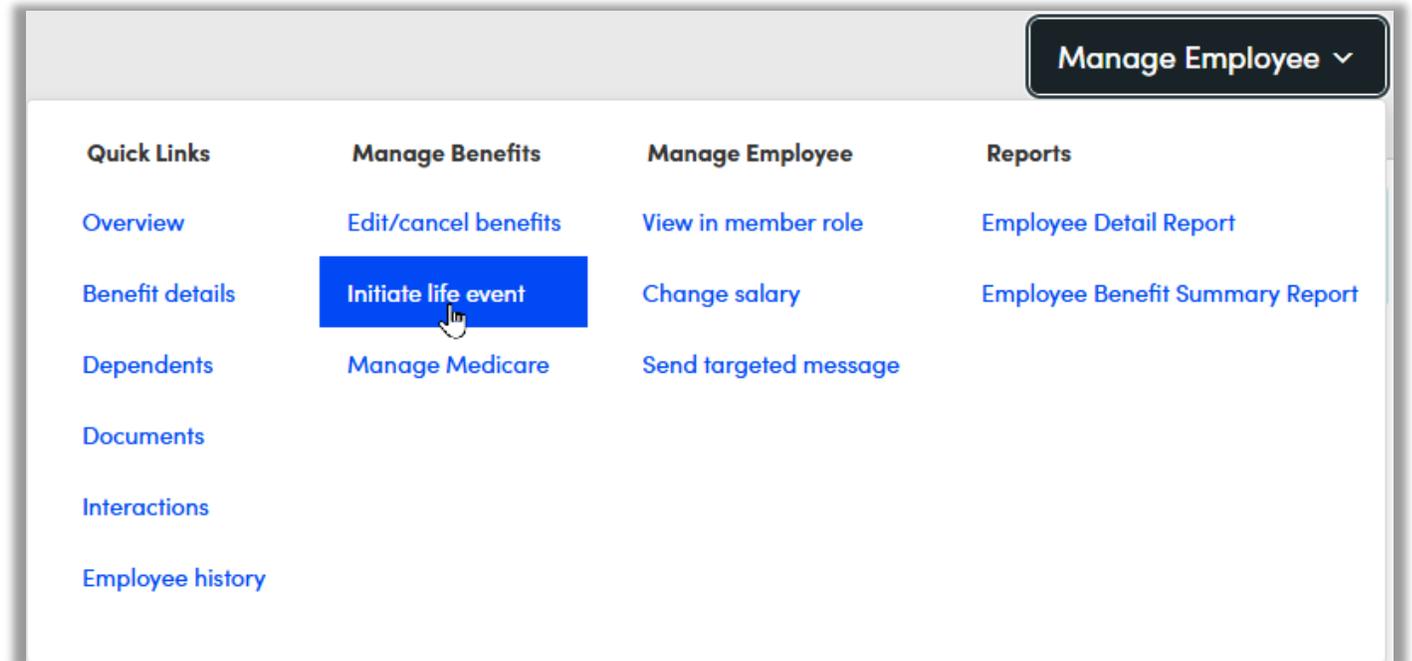


If employee chooses to continue benefits when starting LOA:

- Employer must continue contributing their employer premium contribution for three months
- After three months, employee chooses to continue benefits and pay entire premium or to lapse coverage
- Employer must take action after three months!

# Initiate LOA Life Event if Lapsing Coverage

From member record, click “Manage Employee” drop-down and select “Initiate life event”



The screenshot displays a web interface for managing an employee. At the top right, there is a dark button labeled "Manage Employee" with a downward arrow. Below this, the interface is organized into four columns: "Quick Links", "Manage Benefits", "Manage Employee", and "Reports".

Quick Links	Manage Benefits	Manage Employee	Reports
<a href="#">Overview</a>	<a href="#">Edit/cancel benefits</a>	<a href="#">View in member role</a>	<a href="#">Employee Detail Report</a>
<a href="#">Benefit details</a>	<a href="#">Initiate life event</a>	<a href="#">Change salary</a>	<a href="#">Employee Benefit Summary Report</a>
<a href="#">Dependents</a>	<a href="#">Manage Medicare</a>	<a href="#">Send targeted message</a>	
<a href="#">Documents</a>			
<a href="#">Interactions</a>			
<a href="#">Employee history</a>			

The "Initiate life event" link in the "Manage Benefits" column is highlighted with a blue background and a mouse cursor is pointing at it.

# LOA Life Event Process

**Initiate a Life Event for Employee**

You are initiating a life event for this employee

Life Event Type

- Guardianship of a child
- Job Change Where Significant Share of Employer Contribution is Lost
- Lapse of Benefits due to Leave of Absence**
- Lapse of Benefits due to Military Leave
- Legal Custody of a Child
- Less than Half Time to Full Time
- Loss of dependent child status
- Loss of other coverage
- Marriage

Next

Initiate Life Event tool loads

Select “Lapse of Benefits due to Leave of Absence” as the life event type

From Initiate Life Event tool, enter date and save event

# Return from LOA

---

Employer determines if coverage lapsed or continued

If employee continued coverage, employer:

- Determines employee eligibility
- Updates status category in PeopleSoft

If employee lapsed coverage, employer

- Uses “Return from LOA” change reason to reenroll

# Processing Transfers, Rehires, and Rehired Annuitants

---



# Defining Sponsors

Employers also known as “sponsors”

- Employees may work for different state and local employers

“Sponsors” refers to employer’s payroll center

## List of Sponsors

Any Local Employer

UWHC

WHEFA

Fox River Navigational Authority

STAR/DOA/Central Payroll

WHEDA

Beyond Vision

UW

WEDC

# Transfers and Rehires Definitions

## “Transfer” definition:

- State employee who terminates employment and begins employment with another state “sponsor” within 30 days
- NOTE: Employers *must* conduct prior service inquiries

## “Rehire” definition:

- State employee who terminates employment with a sponsor and begins employment with the same sponsor within 30 days

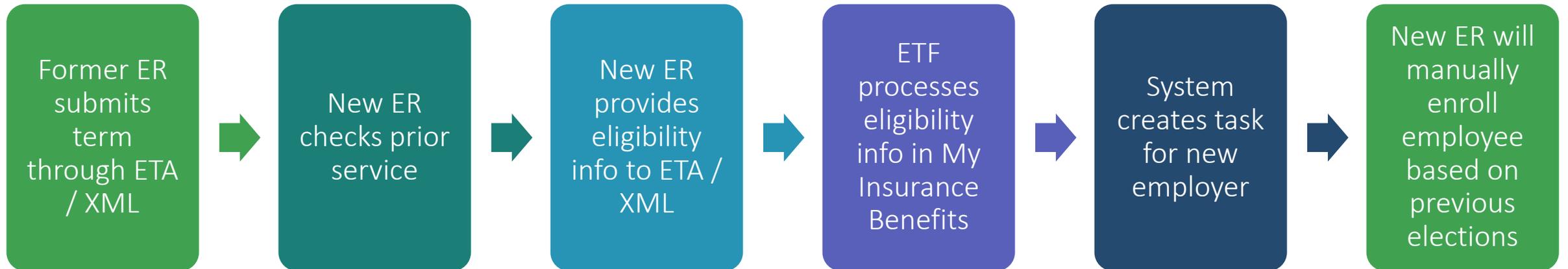
## Scenarios that are neither transfers or rehires:

- Local to local
- State to local
- Local to state
- >30 days break in service

NOTE: Transferred and rehired employees cannot see benefits they had under former employer. To know their benefits, they will need to print their benefits prior to terminating employment

# State-to-State Transfer: Different Sponsor

---



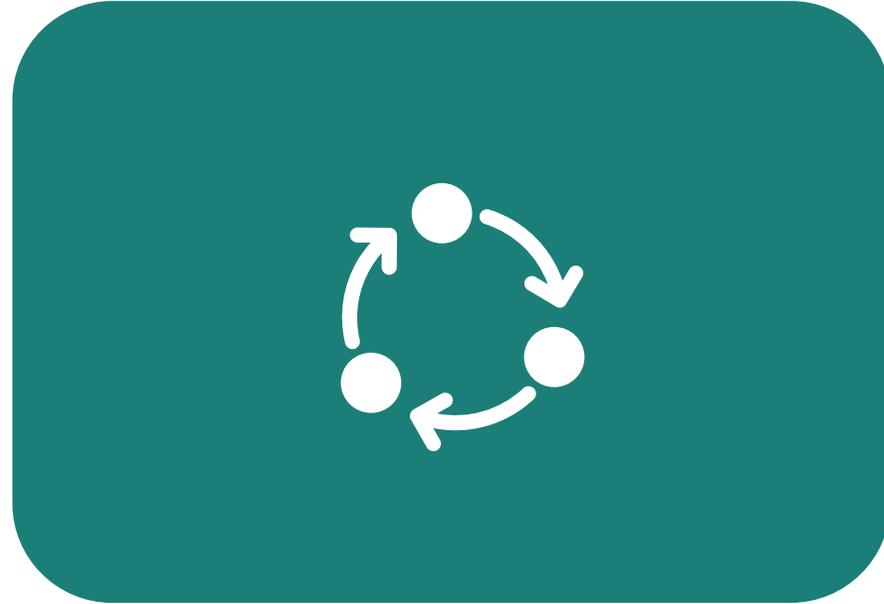
NOTE: This is effective July 1 — Reference Cutover Training prior to then

# Rehire Under Same Sponsor (within 30 days)

---



Employer sets “Rehire  
Category Value” in ETA / XML  
file



ETF will process rehire record

- My Insurance Benefits will reinstate employee’s benefits with correct dates

# Rehired Annuitants – Life Insurance

---

Procedure details → *Employer IAS Procedures (ET-1111)*

Rehired annuitant (RA) suspends annuity

Employer must meet with RA to determine life insurance choice

- Newly enrolling as active employee
- Enrolling as active and replacing previous annuitant life benefit
- Maintaining coverage as annuitant (pay insurance company)

Employer must use correct code in ETA XML file

# Touchpoint – Questions?

---



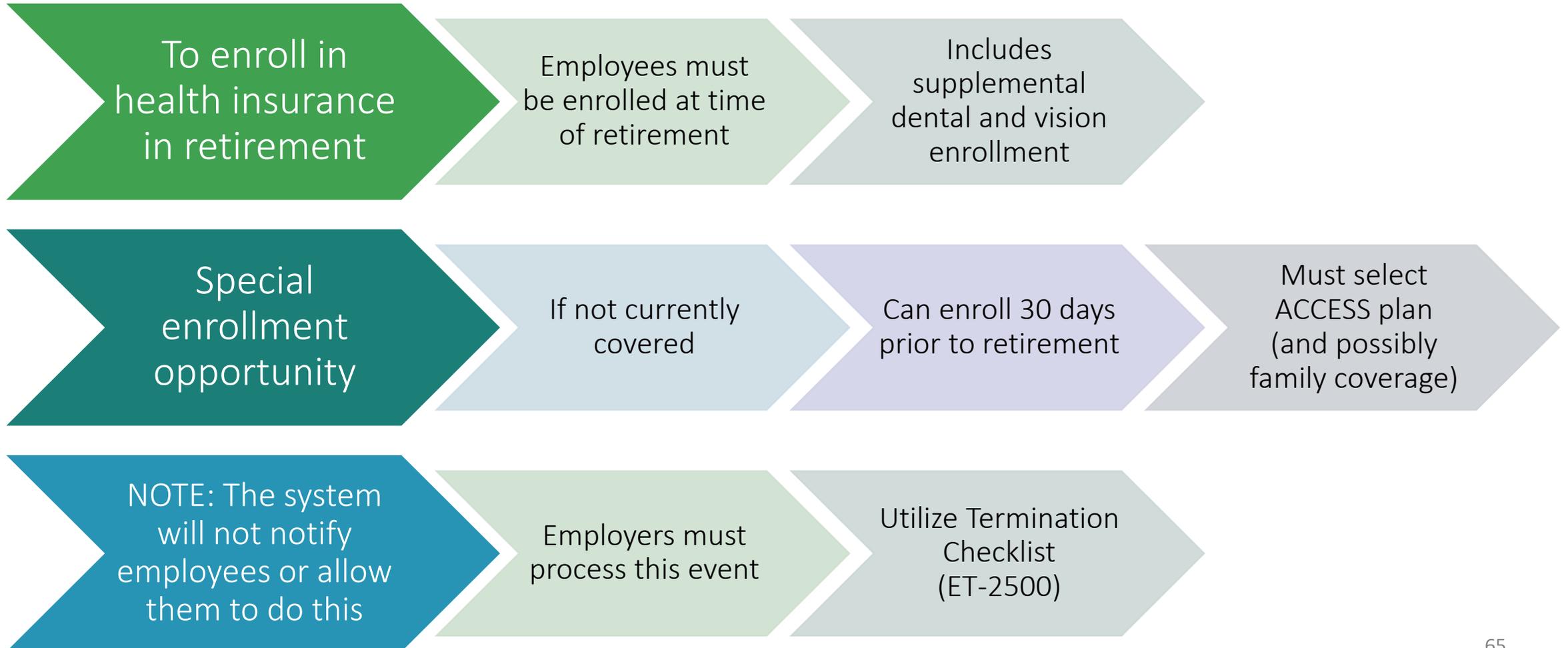
# Processing Retirees

---



# State Employee Retiring: Special Enrollment Opportunity

---



# State employee retiring, Married to local employee, & Enrolled in local coverage

## Current state:

- Dual coverage for one month during month of retirement

## Future State Option 1:

- Local employer terms *just* state spouse
- State employee (retiring) enrolls in state health insurance
- State employer terms for retirement
- Retiree can choose to cancel

## Future State Option 2:

- Local employer terms *entire* contract
- Family enrolls in state health insurance family
- State employer terms for retirement
- Retiree can choose to cancel

# Retirees & Terminations

---

## Terminating considerations

- Terminate via PeopleSoft
- Terminate ASAP
- Can enter termination up to 7 days prior  
→ System waits to process until actual date
- Delay could impact Medicare & impact financially

Retirees will not have access during transition

State Layoffs Note: Sick leave paying premiums = different date



# Processing Retirees Notes

---



## New retirees in My Insurance Benefits

Automatic health & supplemental enrollment in retirement sponsor (supplementals currently require application)

New ETF forms replace vendor forms (supplemental):  
[Supplemental Insurance Application/Change \(ET-2339\)](#)

Pre-retirement is last opportunity to enroll in programs  
(this isn't new)

# State Employers: Processing Retirees Reminders



*Termination  
Checklist for State  
Employers  
(ET-2500S)*



Process Sick Leave  
Certification



## Online Tools

- Employer Training >
- ETF Web Applications for Employers  
(formerly on the ONEsite) >
- MyETF Benefits Administrator for  
Employers >
- Accumulated Sick Leave System (AcSL) >**
- Employer Contact and Password Help >
- Order Employer Forms >
- Career Benefits For State Employees Page >
- Employee Reimbursement Account  
Contributions >

NOTE: Retirees status shows "Terminated" → Retirement appears when loaded with retiree sponsor

# Touchpoint – Questions?

---



# Understand COBRA & My Insurance Benefits

---



# COBRA Administration



## What is Not Changing?

- Eligible COBRA events (e.g. Divorce, Termination, etc.)
- Continuing health insurance, dental, wellness, and FSA
- Not Life Insurance → contact Securian
- “Qualified Beneficiary” (not “Subscriber” or “Dependent”)

## What is Changing?

- July 1 and after → Voya sends automatically
- Interim process May 1 – July 1 → ETF sends offer
- Supplemental vendor forms not required
- Qualified beneficiary pays premiums to Voya → Voya pays vendors

# Qualifying COBRA Events

---

Termination

Divorce

LOA

Layoff

Aging out

Loss of  
dependent  
disability status

Grandchild's  
parent turns 18

New employee  
terminates  
before 30 days

NOTE: Gross misconduct terminations are NOT eligible for COBRA

# Changes in COBRA & Divorce

---

My Insurance Benefits sends COBRA offers within five days of eligibility notice

- Required by statutes
- System automates

Just for divorce: Ex-spouse & stepchildren lose coverage end of month five days after notice

Notices given later in month can result in coverage removal next month

Example: Subscriber adds divorce in system and removes ex-spouse March 28



COBRA offer sent



Ex-spouse removed end of month five days after notice (March 28)  
→ April 30

# Changes for Retirees & COBRA

New retirees will receive COBRA letters

Automatically sent out by Voya upon termination

Required to send

COBRA ≠ Retiree health insurance

Most retirees should ignore this COBRA offer

COBRA letter addresses possibility of retiree benefits

Employer role

Notify retiring employees of COBRA letter

Update email address

**Please note:** As you review your COBRA Election Form, your employer recommends that you also review any Wisconsin Retirement System benefits you may have with the Wisconsin Department of Employee Trust Funds (ETF). This is especially important if you are at or approaching minimum retirement age (age 55 for most, age 50 for some protective occupation employees) or ended your employment due to disability, as retirement benefits may offer an alternative to COBRA depending on your individual circumstances.

# Touchpoint – Questions?

---



# Resources

---



# Support Plan for DOA – Data Corrections



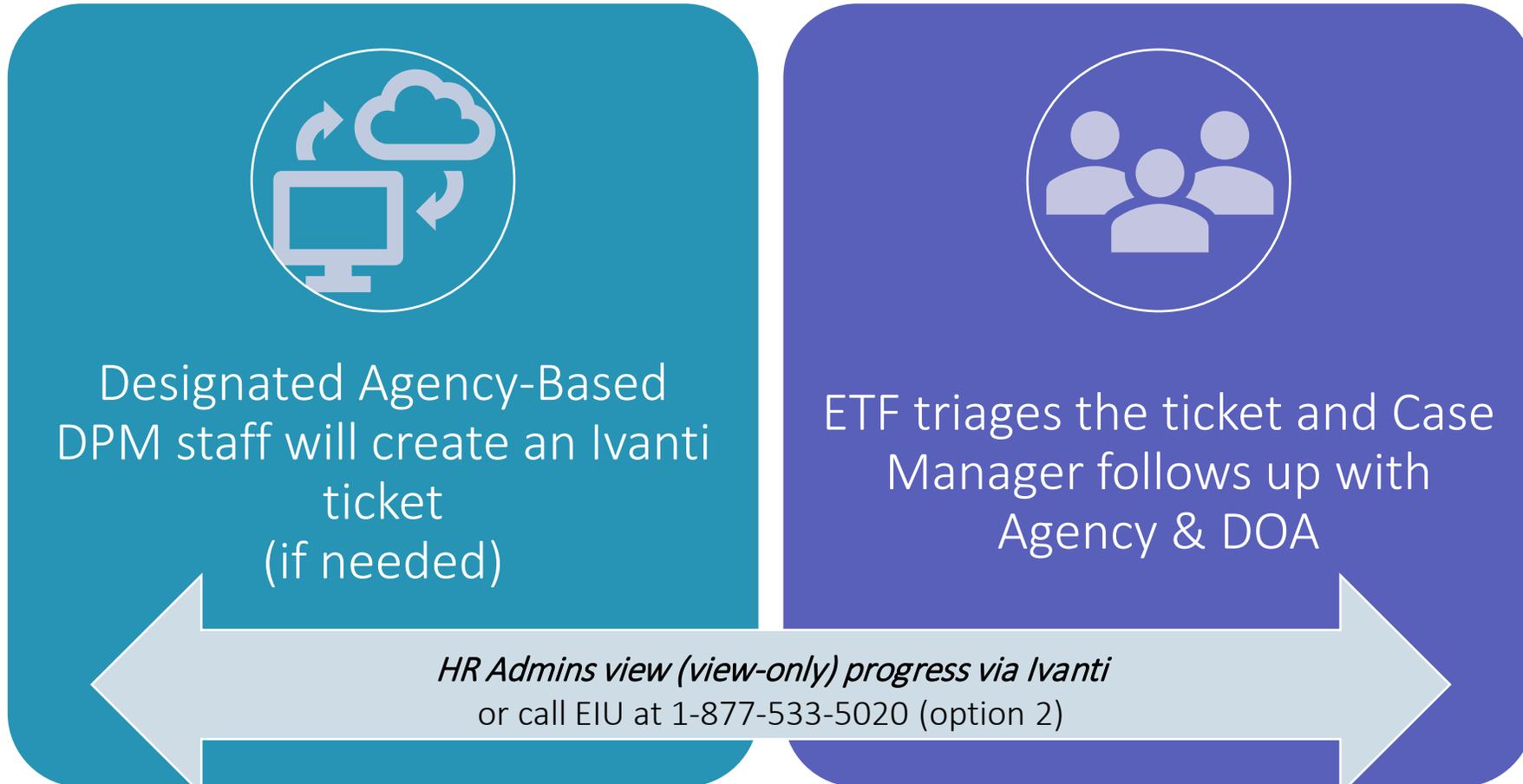
Create Jira Ticket for Data Corrections that cannot be passed on the ETA file

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



# State Employer 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

# Practical Exercise

- Divorce & Remove Dependent
- Birth, Add Dependent, & Change Health Plans

REMINDER: All life events are in  
*Life Event Companion Guide*



# 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 201 Practical Exercise

Look for two lists:

- Practical Exercise Log-In
- IAS 201 Practical Exercise

Practical Exercise Log-In:

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

IAS 200 Practical Exercise Steps

Link: <https://eetest-intc.benefitfocus.com/go/stateofwisconsin>

First Name	Last Name	HR Admin Name	Password
		HRADMINSTATE019	Welcome2
		HRADMINSTATE020	Welcome2
		HRADMINSTATE021	Welcome2
		HRADMINSTATE022	Welcome2
		HRADMINSTATE023	Welcome2
		HRADMINSTATE024	Welcome2
		HRADMINSTATE025	Welcome2
		HRADMINSTATE026	Welcome2
		HRADMINSTATE027	Welcome2

# Task 1: Add Divorce QLE & Remove Dependent



Goals:

1. Member → Add Divorce QLE & Remove Dependent
2. HR Admin → Verifies removal

Follow along with trainer

# Task 2: Add Birth QLE, Add Dependent, & Change Health Plans



## Goals:

1. Member → Add Birth QLE & dependent
2. HR Admin → Verify dependent
3. HR Admin → Change health plans

Follow along with trainer

# Touchpoint – Questions?

---



# Feedback Survey

---



# Thank you

---



[etf.wi.gov](http://etf.wi.gov)



ETF E-mail Updates



1-877-533-5020

