



Course 204: Reporting for Employers

HR Administrator Training



Technology Check

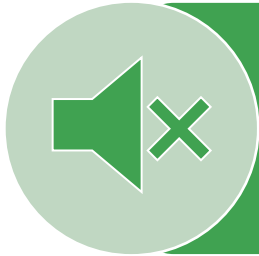


Can you see the
screen?



Can you hear
the speaker?

Ground Rules



Mute yourself throughout training

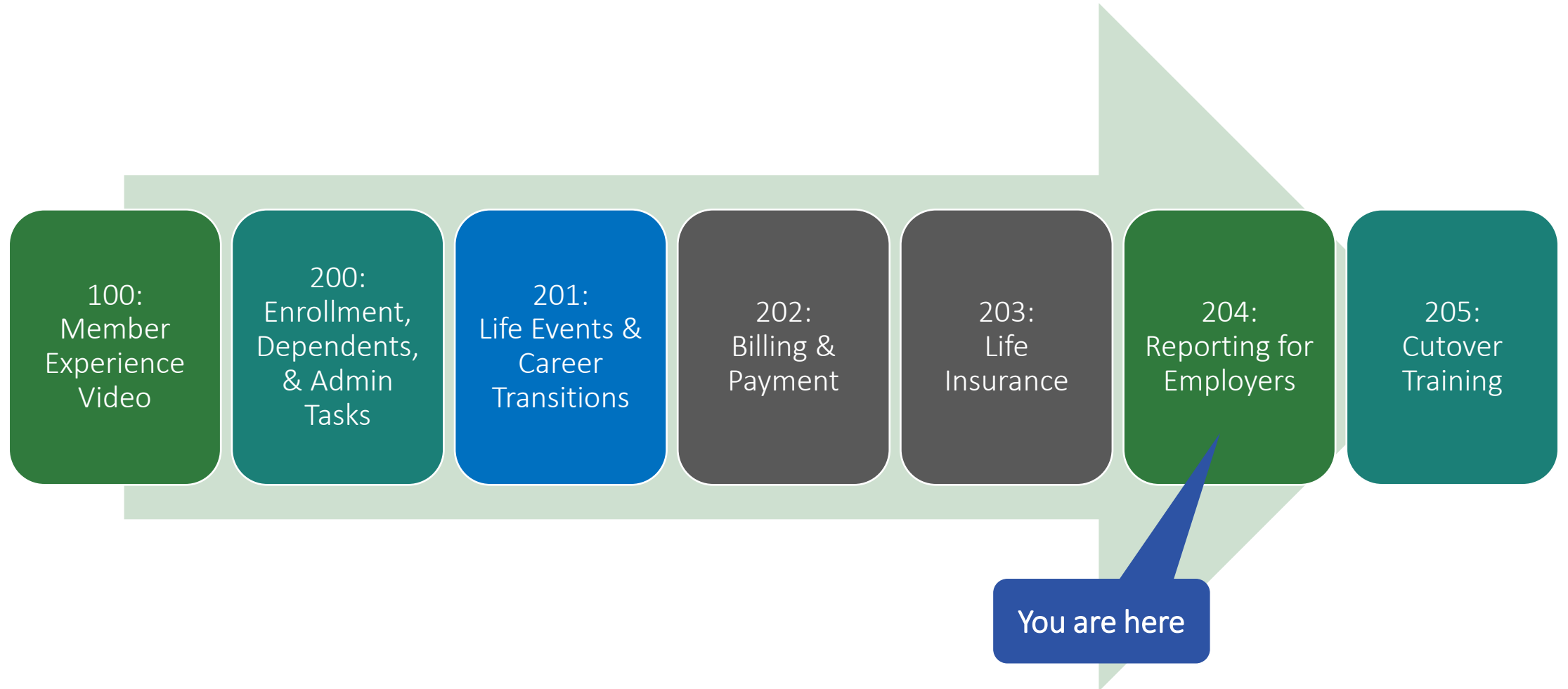


Ask questions via MS Teams chat feature



Cameras off

DOA Learner Journey



Learning Objectives

Locate reports within My Insurance Benefits

Differentiate between standard and interactive reports

Describe how to run standard reports

Navigate the basics of filtering reports

Describe how to schedule reports

Reference reporting resources

Support for HR Administrators

My Insurance Benefits HR Admin Guide



Robust explanation
of system

Chapters on
multiple topics

Website Resource
Page

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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](#)



Reporting Guides

Interactive Reporting

User Guide for Embedded Interactive Reporting

Benefitfocus

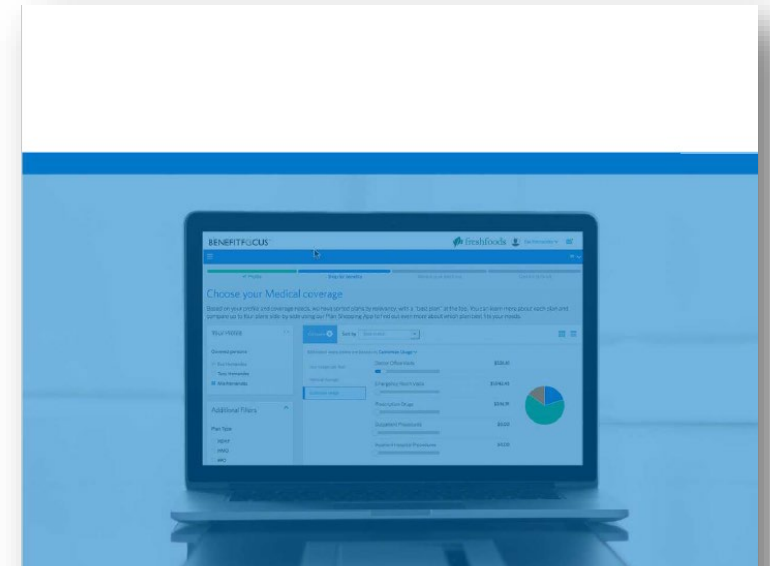


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Two distinct guides for reporting

Additional tool that dives deep into the data

[IAS Resource Page](#)



BENEFITFOCUS® Standard Reports

Feature Highlight

BENEFITFOCUS®
All Your Benefits. One Place.®

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:

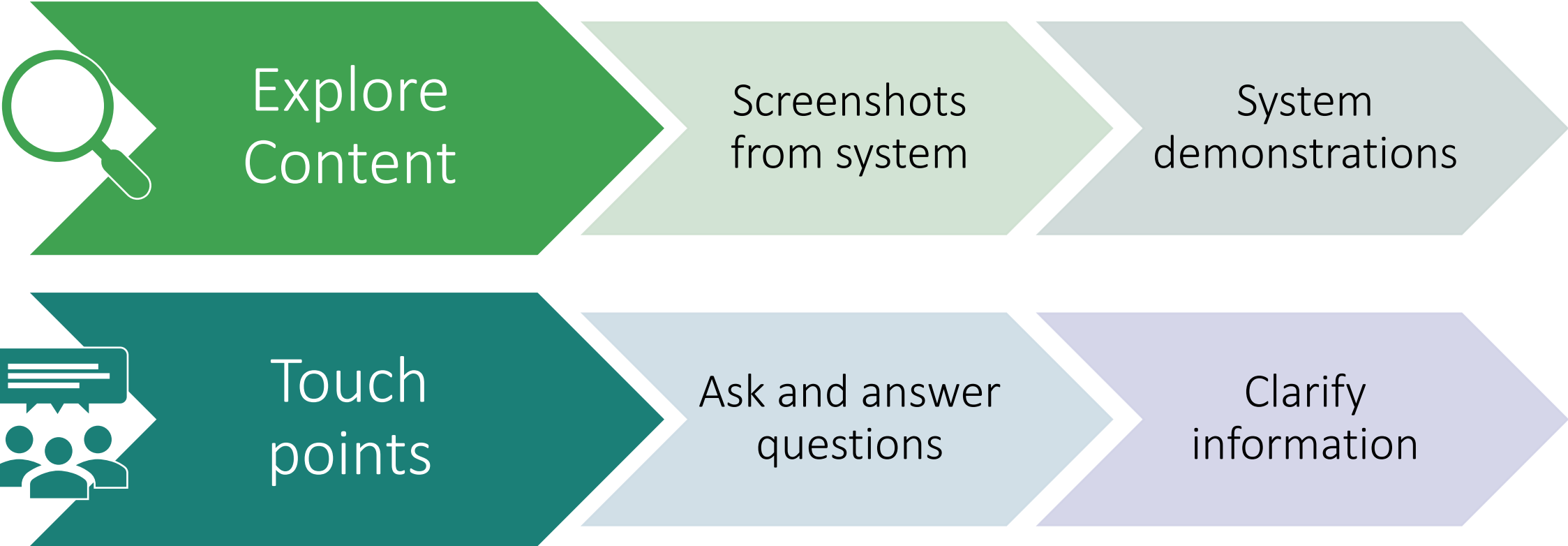
- Multiple systems
- Complex and rare situations
- Open Enrollment
- Errors, etc.

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

Updated regularly with employer newsletters

[IAS Resource Page](#)

Training Expectations



Locate Reports in My Insurance Benefits

- Why use the reports?
- Where can you find reports?
- What are standard and interactive reports?





Why use the reports in My Insurance Benefits?

- Validation/Audit
- Research and troubleshooting issues
- Include reports in a work process



Where can you find reports?

The screenshot displays the Benefitplace web application interface. At the top, a dark red header contains the text "EETEST-INTC" and "Version e20c5ed9c625d8fac6b9e6da7c5c72a8fdef103, 2603.76-8, 2026-03-05 16:02". Below this, the "Benefitplace" logo is visible. The main content area features a welcome message: "Welcome, SWI Training Sponsor - State!". A search bar with the placeholder "Search by Name or SSN" is present. A "To-do list" section includes a "View by:" dropdown menu set to "Please Select" and a blue instruction box: "Please select a category from the above dropdown." The "Benefit Participation" section shows a date range dropdown set to "01/01/2026 - 12/31/2026" and a category dropdown set to "Medical". A bar chart below these dropdowns shows a value of 724 on a scale from 700 to 800.

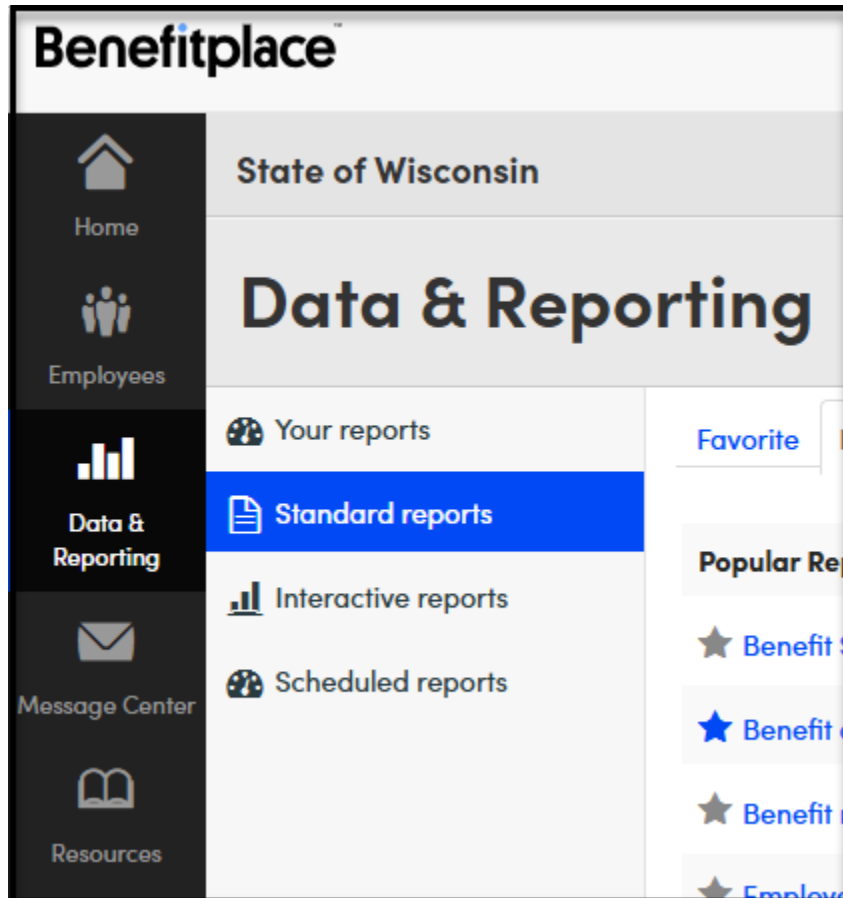
Navigation Menu (Left Sidebar):

- Home
- Employees
- Data & Reporting** (highlighted with a green box)
- Targeted Messages
- Resources
- Group Settings

Main Content Area:

- Header: Benefitplace
- Welcome, SWI Training Sponsor - State!
- Search: Search by Name or SSN
- To-do list: View by: Please Select
- Instruction: Please select a category from the above dropdown.
- Benefit Participation: 01/01/2026 - 12/31/2026, Medical, 724

What's the difference in reports?



Standard Reports

- Over 40 report options
- Data is at the point the report is run

Interactive Reports

- Allows for point in time capability
- No need to do upfront parameters
- Interactive experience with widgets
- Limited (but growing) number of reports

Your Reports – Standard Reports

Status: pending or complete

Scheduled reports appear here

Standard Reports remain available for 5 days

Download or Share

Benefitplace™

State of Wisconsin

Home

Employees

Data & Reporting

Message Center

Resources

Group Settings

Data & Reporting

Your reports

- Standard reports
- Interactive reports
- Scheduled reports

Your Reports

These are the reports that you have received

Status	Created
--------	---------

Standard Reports can be Scheduled

The screenshot shows the Benefitplace web application interface. At the top left is the logo "Benefitplace". Below it is a navigation sidebar with icons and labels: Home, Employees, Data & Reporting (highlighted), Message Center, Resources, and Group Settings. The main content area is titled "State of Wisconsin" and "Data & Reporting". Under "Data & Reporting", there are four sub-sections: "Your reports", "Standard reports", "Interactive reports", and "Scheduled reports" (highlighted in blue). The "Scheduled reports" section displays the heading "Your Scheduled Reports" and the message "You do not have any reports scheduled."

Touchpoint – Questions?





Standard Reports

My Insurance Benefits



Standard Reports

Benefitplace etf Jennifer McGraw

Search by Name or SSN or ETF Member ID

Data & Reporting

Your reports

- Standard reports
- Interactive reports
- Scheduled reports

Favorite Popular **Benefit** Census Administrative Payroll and Billing ~~Transaction History~~

Popular Reports

- ★ [Benefit Summary](#) Includes cost and enrollment summary information for each plan and coverage level
- ★ [Benefit detail](#) Includes cost and enrollment information for each covered person
- ★ [Benefit refused / cancellation](#) Includes enrollment information for persons that refused or cancelled coverage
- ★ [Employee Participation](#) Includes detailed information regarding employee participation
- ★ [Employee census](#) Includes name, address, and date information for all employees
- ★ [Dependent census](#) Includes basic information for dependent spouses and/or children; you have the option to show only dependents turning a particular age between dates that you specify
- ★ [Terminated employees](#) Includes basic information for employees terminated between dates that you specify
- ★ [Task List](#) Provides a list of items which requires attention
- ★ [Active User Accounts](#) Includes details of current active administrator user accounts

Standard Report

- Enter the dates
- Run the report
- Download as an Excel spreadsheet (CSV)

Benefitplace

Home
Employees
Data & Reporting
Message Center
Resources
Group Settings

Data & Reporting

Your reports
Standard reports
Interactive reports
Scheduled reports

Terminated Employees Report

Formatting Options

Report Format: Excel Compatible (CSV) ▼

To include additional report options, change the Report Format to CSV.

Include filter criteria in results

Group by: ----None----

Sort by: Last Name, First Name ▼

Mask SSN in Report Results

Filtering Options

Termination Date Range*
Start Date: [Calendar Icon]
End Date: [Calendar Icon]

Calendar Set* All selected (4) ▼

Current Age for Basic Life* All selected (5) ▼

Dental Payment Source* All selected (4) ▼

Dual Employment* All selected (3) ▼

Employee Type* All selected (6) ▼

Employer Medical Surcharge* All selected (2) ▼

Employer Sub-Unit* All selected (21) ▼

Employer Unit* All selected (19) ▼

Employer Unit Program Option* All selected (2) ▼

Employment Status* All selected (8) ▼

Health Insurance at Retirement* All selected (2) ▼

Group by and Sort by

- **Group by** groups selected category of items together in the spreadsheet
- **Sort by** allows you to choose the data element to sort by

The screenshot shows the Benefitplace interface for the 'Terminated Employees Report'. The left sidebar contains navigation options: Home, Employees, Data & Reporting (selected), Message Center, Resources, and Group Settings. The main content area is titled 'Data & Reporting' and 'Terminated Employees Report'. Under 'Your reports', 'Standard reports' is selected. The 'Formatting Options' section includes a 'Report Format' dropdown set to 'Excel Compatible (CSV)', a checkbox for 'Include filter criteria in results', and a 'Group by' dropdown menu currently set to '----None----'. The 'Sort by' dropdown is set to 'Last Name, First Name'. A dropdown menu is open for 'Sort by', showing options: 'Last Name, First Name', 'SSN', 'ETF Member ID', and 'Employer ID'. Below this, there are 'Filtering Options' including 'Termination Date Range*' with an 'End Date' field, and several other filters: 'Calendar Set*' (All selected (4) -), 'Current Age for Basic Life*' (All selected (5) -), 'Dental Payment Source*' (All selected (4) -), and 'Dual Employment*' (All selected (3) -).

Formatting and Filtering within Reports

Group by: groups data on the report by categories.

These categories are on the member's page in My Insurance Benefits.

The screenshot shows the 'Benefitplace' interface for a 'Terminated Employees Report'. The left sidebar contains navigation icons for Home, Employees, Data & Reporting (highlighted), Message Center, Resources, and Group Settings. The main content area is titled 'Data & Reporting' and 'Terminated Employees Report'. Under 'Your reports', 'Standard reports' is selected. The 'Formatting Options' section includes a 'Report Format' dropdown set to 'Excel Compatible (CSV)', a checkbox for 'Include filter criteria in results', a 'Group by' dropdown set to '----None----', a 'Sort by' dropdown set to 'Last Name, First Name', and a checkbox for 'Mask SSN in Report Results'. The 'Filtering Options' section lists various filters, all set to 'All selected': 'Termination Date Range*' (with 'Start Date' and 'End Date' date pickers), 'Calendar Set*', 'Current Age for Basic Life*', 'Dental Payment Source*', 'Dual Employment*' (highlighted with a green box), 'Employee Type', 'Employer Medical Surcharge*', 'Employer Sub-Unit*', 'Employer Unit*', 'Employer Unit Program Option*', 'Employment Status*', and 'Health Insurance at Retirement*'. A search bar is visible in the top right corner.

Formatting and Filtering within Reports

Additional filtering options for the details of the categories. They are all selected by default, but you could unselect to narrow your results.

The screenshot displays the Benefitplace interface for generating a 'Terminated Employees Report'. The left sidebar contains navigation options: Home, Employees, Data & Reporting (selected), Message Center, Resources, and Group Settings. The main content area is titled 'Data & Reporting' and includes a sub-menu with 'Your reports', 'Standard reports' (selected), 'Interactive reports', and 'Scheduled reports'. The report title is 'Terminated Employees Report'. Under 'Formatting Options', the 'Report Format' is set to 'Excel Compatible (CSV)'. A note states: 'To include additional report options, change the Report Format to CSV.' There is an unchecked checkbox for 'Include filter criteria in results'. The 'Group by' dropdown is highlighted with a green box and set to 'Category: Employment Status'. The 'Sort by' dropdown is set to 'Last Name, First Name'. There is an unchecked checkbox for 'Mask SSN in Report Results'. Under 'Filtering Options', there are date pickers for 'Termination Date Range*' with 'Start Date' and 'End Date' fields. Below these are several filter categories, all of which are currently set to 'All selected': 'Calendar Set*' (4), 'Current Age for Basic Life*' (5), 'Dental Payment Source*' (4), 'Dual Employment*' (3), 'Employee Type*' (6), 'Employer Medical Surcharge*' (2), 'Employer Sub-Unit*' (21), 'Employer Unit*' (19), 'Employer Unit Program Option*' (2), 'Employment Status*' (8), and 'Health Insurance at Retirement*' (2).

Additional Filtering Options

Defaults to All

Use the "Ctrl" key to select multiple options

The screenshot displays a list of filtering options on the left and a dropdown menu for 'Employment Status' on the right. The dropdown menu is open, showing a search bar and a list of options, each with a checked checkbox. The options are: 'Select all', 'FT - Full Time Active Employee', 'LF - Layoff - Full Time', 'LP - Layoff - Part Time', 'OF - Leave of Absence - Full Time', 'OP - Leave of Absence - Part Time', 'PT - Part Time Active Employee', 'RL - Retiree in Lieu of Layoff', and 'Not Assigned'. The 'Employment Status' filter is highlighted with a green box, and the dropdown menu is also highlighted with a green box.

Filter Name	Current Selection
Employer Sub-Unit*	All selected (21) ▾
Employer Unit*	All selected (19) ▾
Employer Unit Program Option*	All selected (2) ▾
Employment Status*	All selected (8) ▾
Health Insurance at Retirement*	
Health Payment Source*	
ICI Contrib Wait Period Met*	
ICI Premium Category*	
ICI Premium Walver*	
Legacy Life*	
Life Payment Source*	
Life Premium Walver*	
Medical Contrib Wait Period*	
Medical Premium Contribution*	
Medicare Some Rate Override*	
Opt Out Incentive Eligible*	All selected (4) ▾

Documentation Review Report

The screenshot displays a web application interface for 'Data & Reporting'. The left sidebar contains navigation options: Home, Employees, Data & Reporting (selected), Targeted Messages, Resources, and Group Settings. The main content area is titled 'Data & Reporting' and features a sub-menu with 'Your reports', 'Standard reports' (selected), 'Scheduled reports', and 'Data exchange'. A secondary menu includes 'Favorite', 'Popular', 'Benefit' (highlighted with a red box), 'Census', 'Administrative', 'Payroll and Billing', and 'Transaction History'. Below this, a list of reports is shown under the heading 'Benefit'. The 'Documentation Review Report' is highlighted with a red box. The list includes the following items:

Report Name	Description
★ Benefit Summary	Includes cost and enrollment summary information for each plan and coverage level
★ Benefit detail	Includes cost and enrollment information for each covered person
★ Benefit refused / cancellation	Includes enrollment information for persons that refused or cancelled coverage
★ Employee Participation	Includes detailed information regarding employee participation
★ Health Savings Account Detail	Includes details of HSA elections along with corresponding medical coverage information
★ Student	Includes student information
★ Life event	Includes basic information about employees with a life event occurring in a specific date range
★ Medicare and Medical Summary	Includes personal information, a brief overview of Medical or Medicare benefit elections and
★ Additional Insurance	Includes details of Additional Insurance policy information
★ Employee Benefit Summary	Includes a compilation of employee benefit summary reports for all employees. Each employee has a brief overview of elected benefits.
★ Benefit Comparison	Compares benefit elections on one date versus another date; shows detailed information for each
★ Dual Enrollment	Dual enrollment reports
★ Pending EOI	Includes basic information for employees with pending health statement / Evidence of Insurance
★ Documentation Review Report	Provides a list of employees whose uploaded documents are ready for review within Document

Tips & Tricks: Allow time for reports

Standard Reports take time to run

Schedule a report

Schedule common reports to post on a reoccurring date and time

Standard Reports can be scheduled

WRS Eligible* All selected (3) ▾

Scheduling Options

1 Create Schedule for Report

Cancel Create Report



Scheduling Options

Create Schedule for Report

2 Schedule Name*

3 Schedule Start Date

4 Schedule End Date

5 Receive Expiration Notice by Email?

6 Schedule Frequency* ▾

7 Cancel Create Report

Where are your reports?

The screenshot shows a web application interface for 'Data & Reporting'. On the left is a navigation sidebar with icons for Employees, Data & Reporting (selected), Message Center, Resources, and Group Settings. The main content area is titled 'Your Reports' and contains a table of reports. The table has columns for Status, Created, Available until, Report Details, Criteria, and Actions. The first report is 'COMPLETE' with a creation date of 03/10/2026 02:32 PM. The second report is 'Terminated Employees Report, 58 bytes' with a creation date of 03/15/2026 02:32 PM. To the right of the table, there are sections for 'Criteria' (GROUP:), 'FORMATTING OPTIONS' (Report Format = Excel Compatible (CSV), Sorted by Last Name, First Name, Grouped by Category: Employment Status), and 'FILTERED BY' (ICI Premium Category: All, Legacy Life: All, Primary Employer: All, Employer Medical Surcharge: All, Protective Status: All, Calendar Set: All, Rehire: All, Employer Unit Program Option: All, ICI Contrib Wait Period Met: All, UW Premium Waiver: All, Employer Unit: All, Health Insurance at Retirement: All, Unique Plan Eligibility: All, Current Age for Basic Life: All, WRS Eligible: All, Out of State Employee: All, ICI Premium Waiver: All, Opt Out Incentive Eligible: All, Tax Status: All, Medicare Some Rate Override: All, Vision Payment Source: All, Health Payment Source: All). A large green arrow labeled 'Download Share' points to a dropdown menu with options: Download, Share, and Delete.

Status	Created	Available until	Report Details	Criteria	Actions
COMPLETE	03/10/2026 02:32 PM	03/15/2026 02:32 PM	Terminated Employees Report, 58 bytes	GROUP: FORMATTING OPTIONS: Report Format = Excel Compatible (CSV) Sorted by Last Name, First Name Grouped by Category: Employment Status FILTERED BY: ICI Premium Category: All Legacy Life: All Primary Employer: All Employer Medical Surcharge: All Protective Status: All Calendar Set: All Rehire: All Employer Unit Program Option: All ICI Contrib Wait Period Met: All UW Premium Waiver: All Employer Unit: All Health Insurance at Retirement: All Unique Plan Eligibility: All Current Age for Basic Life: All WRS Eligible: All Out of State Employee: All ICI Premium Waiver: All Opt Out Incentive Eligible: All Tax Status: All Medicare Some Rate Override: All Vision Payment Source: All Health Payment Source: All	Download Share Delete

Job Aid: Standard Report Fields

- Lists each standard report
 - Description
 - Things to Note
 - Fields available
 - Default Output Fields
 - Additional Output Fields

Report Name	Benefit Summary	Benefit detail	Benefit refus
Description	Includes cost and enrollment summary information for each plan and coverage level	Includes cost and enrollment information for each covered person	Includes enroll persons that r co
Things to Note	None	HSA will not pull to report, see Health Savings Account Detail for HSA enrollments	A "Refused Cover benefit type was nev date will be listed, or A "Cancelled Cover someone was enroll removed, even if the the original effective date and end date w
Available Export Formats	CSV, PDF	CSV, PDF	CS
Can Select by Plan Year?	Not Available	Not Available	Not A
Can select specific Plans? (Includes Previous, Current, and Open Enrollment Plans)	Yes	Yes	
Can select specific Benefit Types?	Not Available	Not Available	Not A
Can select to "Show Dependents?"	Yes	Yes	
Include Hidden Dependents?	Not Available	Not Available	
Include Terminated Employees?	Not Available	Not Available	
Date Range?	Not Available	Not Available	Not A
		Include Enrollments with Future	Cancellation Typ • Refusals and C • Refusals Only • Cancellations.

Demonstration

- Job Aid Standard Report Fields
- Documentation Review Report
- Task List Standard Report



Touchpoint – Questions?



- Standard Reports





Interactive Reports

My Insurance Benefits



Standard vs Interactive Benefit Detail Report

Data & Reporting

- [Your reports](#)
- Standard reports
- [Interactive reports](#)
- [Scheduled reports](#)
- [Data exchange](#)

Benefit Detail Report

Formatting Options

Report Format: Excel Compatible (CSV) ▾

Include filter criteria in results

Additional Details: None selected -

Group by: Benefit Type ▾

Sort by: Employee Last Name, First Name ▾

Mask SSN in Report Results

Filtering Options

Show COBRA Subscribers Only

Include COBRA Subscribers

Show Dependents

Include Enrollments with Future Cancellation/End Dates [click to show additional](#)

Benefit Type*

- All---
- Current Benefits---
- Accident: Accident - Family 2025
- Accident: Accident - Individual + Child(ren) 2025
- Accident: Accident - Individual + Spouse 2025
- Accident: Accident - Individual 2025
- Additional Life Insurance: Additional Life Insurance 2025
- Administrative Fee: Administrative Fee 2025
- Basic Life Insurance: Basic Life Insurance 2025
- Basic Life Insurance: Basic Life Insurance 2025

Benefitplace

[Return to reports](#)

Interactive reports
Benefit Detail ▾

SWI Training Sponsor - State

As of 26 March, 2025

Sponsor(s): All ▾

Participation period: Current ▾

As of date: mm/dd/yyyy ▾

Basic filters

TOTAL BENEFITS

7,740

ACCEPTED BENEFITS

7,740

DECLINED BENEFITS

0

ENROLLMENT BY BENEFIT TYPE

ENROLLMENTS BY RELATIONSHIP

+ Add Category Column(s)

Sponsor OID	Sponsor Name	Person OID	UPID	Employee ID	Relationship Name	Last Name	First Name
10000024091362488	SWI Training Sponsor - State	10000024261216847			SUBSCRIBER	BROWN	SAM

Filters

Filters on this page

- Adjusted Date is (All)
- Benefit Effective Date is (All)
- Benefit End Date is (All)
- Birth Date is (All)
- Defined Contribution Mont... is (All)
- Employee Monthly Cost is (All)
- Employer Monthly Cost is (All)
- Hire Date is (All)
- Hours Worked is (All)
- Rate Effective Date is (All)
- Retirement Date is (All)
- Terminated Date

All reports	
Basic Work	A census of all active and terminated employees within the Benefitfocus platform; includes compensation-related info
Benefit Comparison	Compares employee benefit elections across different participation periods
Benefit Detail	A breakdown of all benefit election and enrollment info for active employees and their dependents at the election level
Benefit Refused Cancellation	A breakdown of all refused, cancelled, and terminated elections at the subscriber level
Benefit Summary	Contains cost-related details for enrollments in each benefit type, on the sponsor and plan-level
Combined Census	Reports employees and dependents, detailing demographic data
Coverage Segments	Displays spans of coverage for employees and dependents within a participation period
Dependent Census	A true census report for dependents that have coverage; does not include benefit election info
Employee Census	A true census report for employees; does not include benefit election info
Employee Participation	A breakdown of elections (either accepted or declined) made by each plan participant at the benefit level
Life Event	Includes basic information about employee life events occurring in a specific date range
Medicare & Medical Summary	Includes all Medical and Rx elections for members who are in Medicare Manager, as well as Medicare policy info
OE Offer Completion	Displays completion of Open Enrollment offers across active enrollment periods

Interactive Report Options

- More reports are planned for 2026
- Communication will occur when new reports are available
- Recommend using the interactive report option vs the standard if there is one available

Interactive Benefit Detail Report

Benefitplace HR AdminState099

[Return to reports](#)

Benefit Detail

Report Options

Benefit Detail

Filter Options

SWI Training Sponsor - State
As of 27 March, 2025

Summation Widget

TOTAL BENEFITS
7,740

ACCEPTED BENEFITS
7,740

DECLINED BENEFITS
0

Data Table

+ Add Category Column(s)

Sponsor OID	Sponsor Name	Person OID	UPID Employee ID	Relationship Name	Last Name	First Name	M
10000024091362488	SWI Training Sponsor - State	10000024261216847		SUBSCRIBER	BROWN	SAM	

Sponsor(s)

All

Participation period

Current

As of date

mm/dd/yyyy

Basic filters

ENROLLMENT BY BENEFIT TYPE

ENROLLMENTS BY RELATIONSHIP

Filters

Search

Filters on this page

- Adjusted Date is (All)
- Benefit Effective Date is (All)
- Benefit End Date is (All)
- Birth Date is (All)
- Defined Contribution Mont... is (All)
- Employee Monthly Cost is (All)
- Employer Monthly Cost is (All)
- Hire Date is (All)
- Hours Worked is (All)
- Rate Effective Date is (All)
- Retirement Date is (All)
- Terminated Date

Filters

- Filter types will vary based on the type of report selected
- When selected, these filters will apply to all the visual widgets displayed

Benefitplace

Return to reports

Benefit Detail

Interactive reports
Benefit Detail

Filters

Search

Filters on this page

- Adjusted Date is (All)
- Benefit Effective Date is (All)
- Benefit End Date is (All)
- Birth Date is (All)
- Defined Contribution Month... is (All)
- Employee Monthly Cost is (All)
- Employer Monthly Cost is (All)

Basic filters

Sponsor(s) Participation period As of date

All Current mm/dd/yyyy

TOTAL BENEFITS
60,539

ACCEPTED BENEFITS
60,182

DECLINED BENEFITS
357

ENROLLMENT BY BENEFIT TYPE

Benefit Type	Enrollment Count
EMP.	10,364
PARK.	10,364
ACORD	6,911
LIFE	6,911
SHO.	5,095
DEN.	3,125
MED.	3,046
PH.A.	3,033

ENROLLMENTS BY RELATIONSHIP

Legend: SUBSCRIBER CHILD SPOUSE DOMESTIC PART.

Basic Filtering

Benefitplace

[Return to reports](#)

Benefit Detail

Interactive reports: Benefit Detail

Sponsor(s): All | Participation period: Current | As of date: mm/dd/yyyy

Basic filters

TOTAL BENEFITS
60,539

ACCEPTED BENEFITS
60,182

DECLINED BENEFITS
357

ENROLLMENT BY BENEFIT TYPE

Benefit Type	Count
TEMP.	10,364
PRAC.	10,364
AD&D	6,911
LIFE	6,911
SHO.	5,095
DEN.	3,125
MED.	3,045
PHI.	3,033

ENROLLMENTS BY RELATIONSHIP

Legend: SUBSCRIBER (blue), CHILD (orange), SPOUSE (green), DOMESTIC PART. (red)

Relationship	Count
SUBSCRIBER	~58,000
CHILD	~1,000
SPOUSE	~1,000
DOMESTIC PART.	~1,000

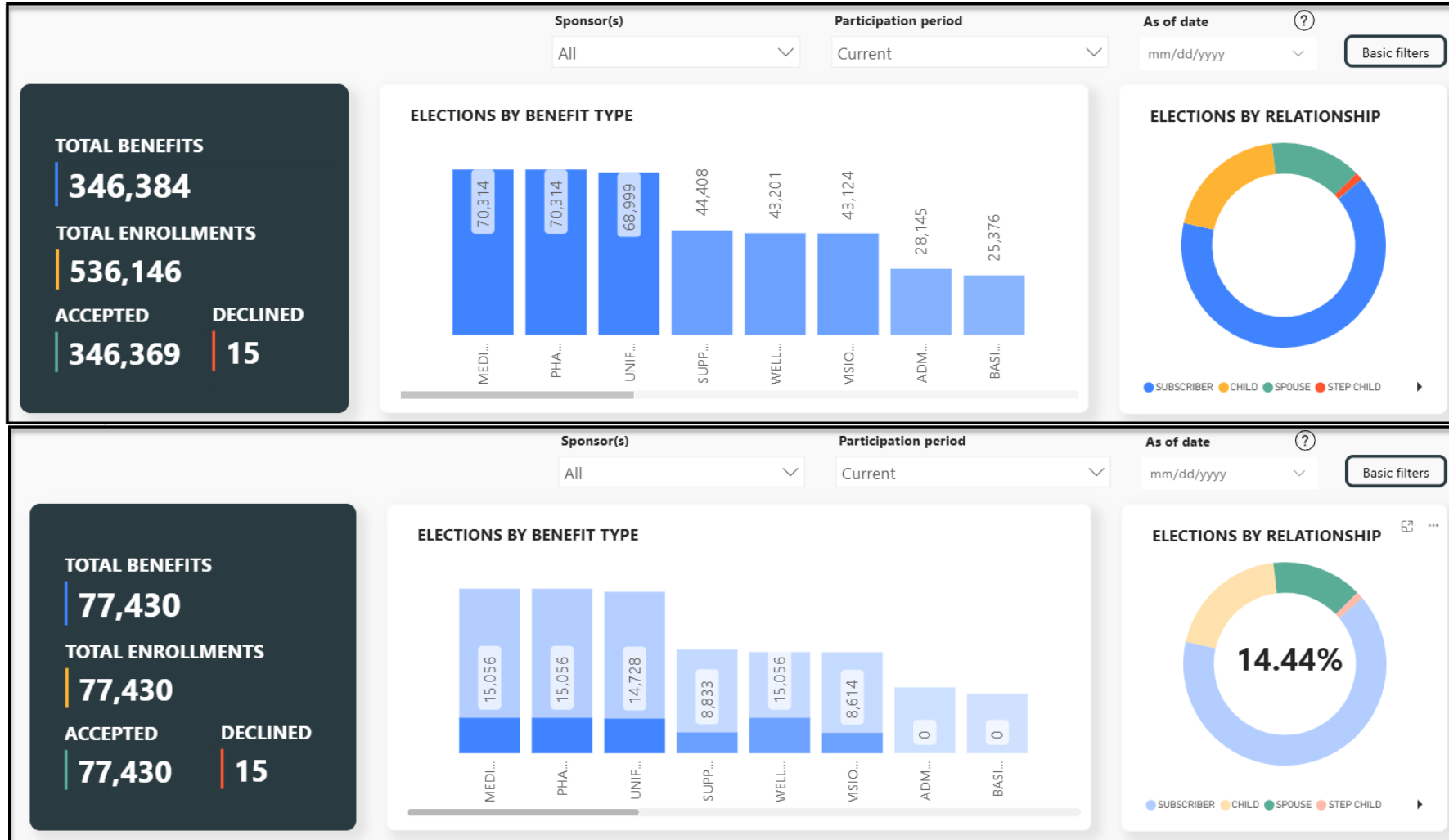
+ Add Category Column(s)

Sponsor OID	Sponsor Name	Person OID	UPID	Employee ID	Relationship Name	Last Name	First Name	Middle Name	Su
-------------	--------------	------------	------	-------------	-------------------	-----------	------------	-------------	----

Filters on this page

- Adjusted Date is (All)
- Benefit Effective Date is (All)
- Benefit End Date is (All)
- Birth Date is (All)
- Defined Contribution Months is (All)
- Employee Monthly Cost is (All)
- Employer Monthly Cost is (All)
- Hire Date is (All)
- Hours Worked is (All)
- Rate Effective Date is (All)

Selecting a data point within a widget



Touchpoint – Questions?



- Interactive Reports



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)*

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

Next steps

- Feedback Survey
- IAS 205: Cutover for Employers





Thank You



ETF E-mail Updates



etf.wi.gov



1-877-533-5020

