



# IAS 205: Cutover for Employers



# Technology Check

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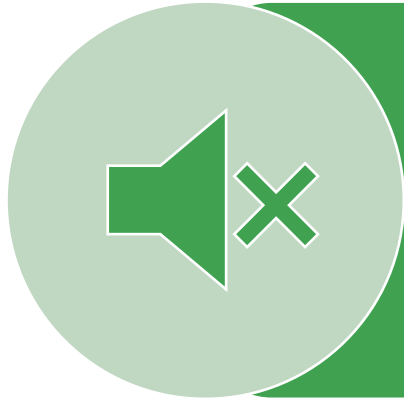
Can you see the  
screen?



Can you hear  
the speaker?

# Ground Rules

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Mute yourself  
throughout training



Ask questions via MS  
Teams chat feature

# Why are we adopting new IAS?

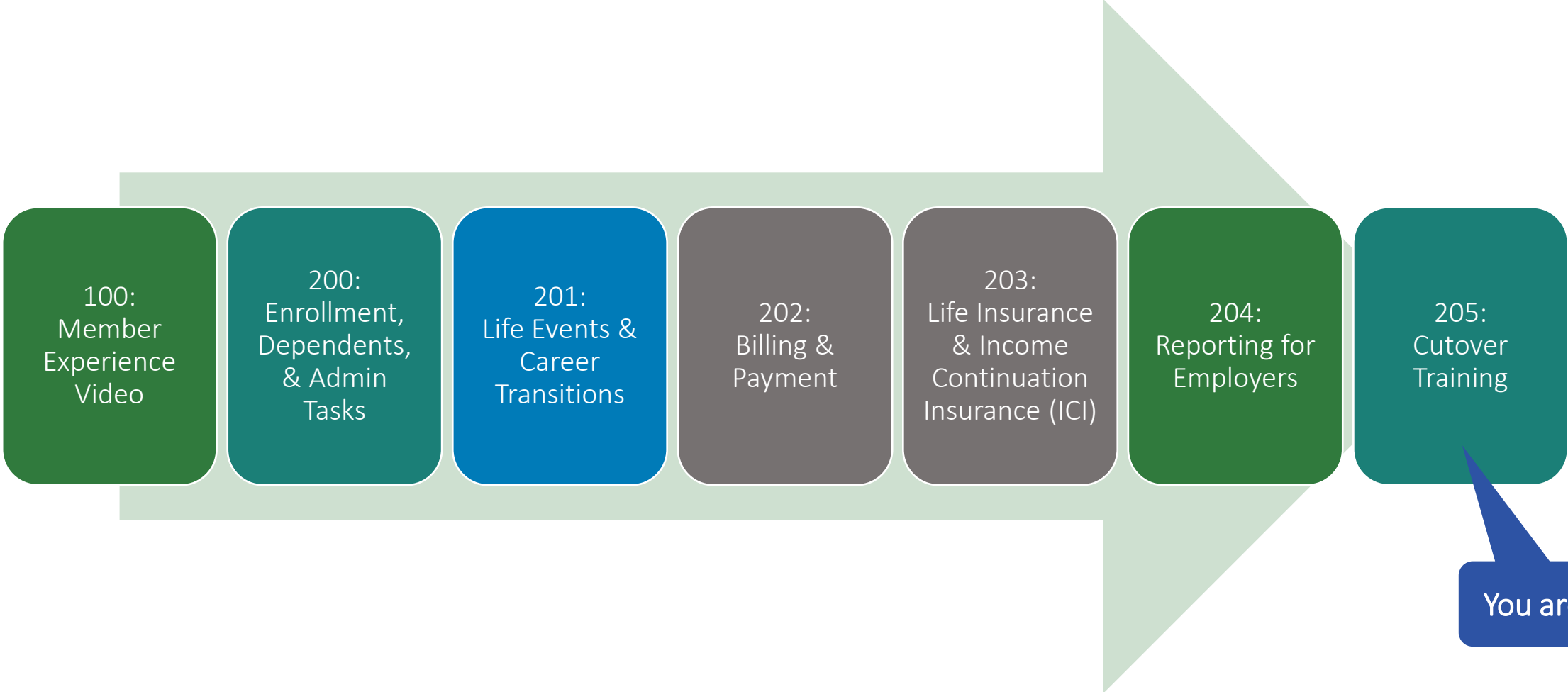
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Empowers members

Enhances customer experience

Streamlines benefits services

# State Agency HR Admin Learner Journey



# Reminder: Member Experience Video



IAS 100: My Insurance Benefits Member Experience (ETF IAS)



Reminder: Members can and should enroll in their own benefits

# Learning Objectives

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Expectations for  
Employers during  
Conversion

Critical Dates for  
Agency HR  
Administrators

Enrollment Freezes  
& Emergency  
Process

Catch Up  
Transactions

Temporary Processes  
(May and June)

Plans for Member  
Access on May 1

Support for  
Employers During  
Cutover

# Expectations for Employers

- What are HR Administrators expected to do during Cutover and Conversion?
- How will Agency HR Administrators know what to do?



# Cutover Expectations for HR Administrators

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Completed Training Courses 100, 200, 201, 204, and 205

Understanding of the HR Administrator Role

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)



# What do HR Admins Need to Know for Cutover?



Awareness of activities



Define Cutover and Conversion

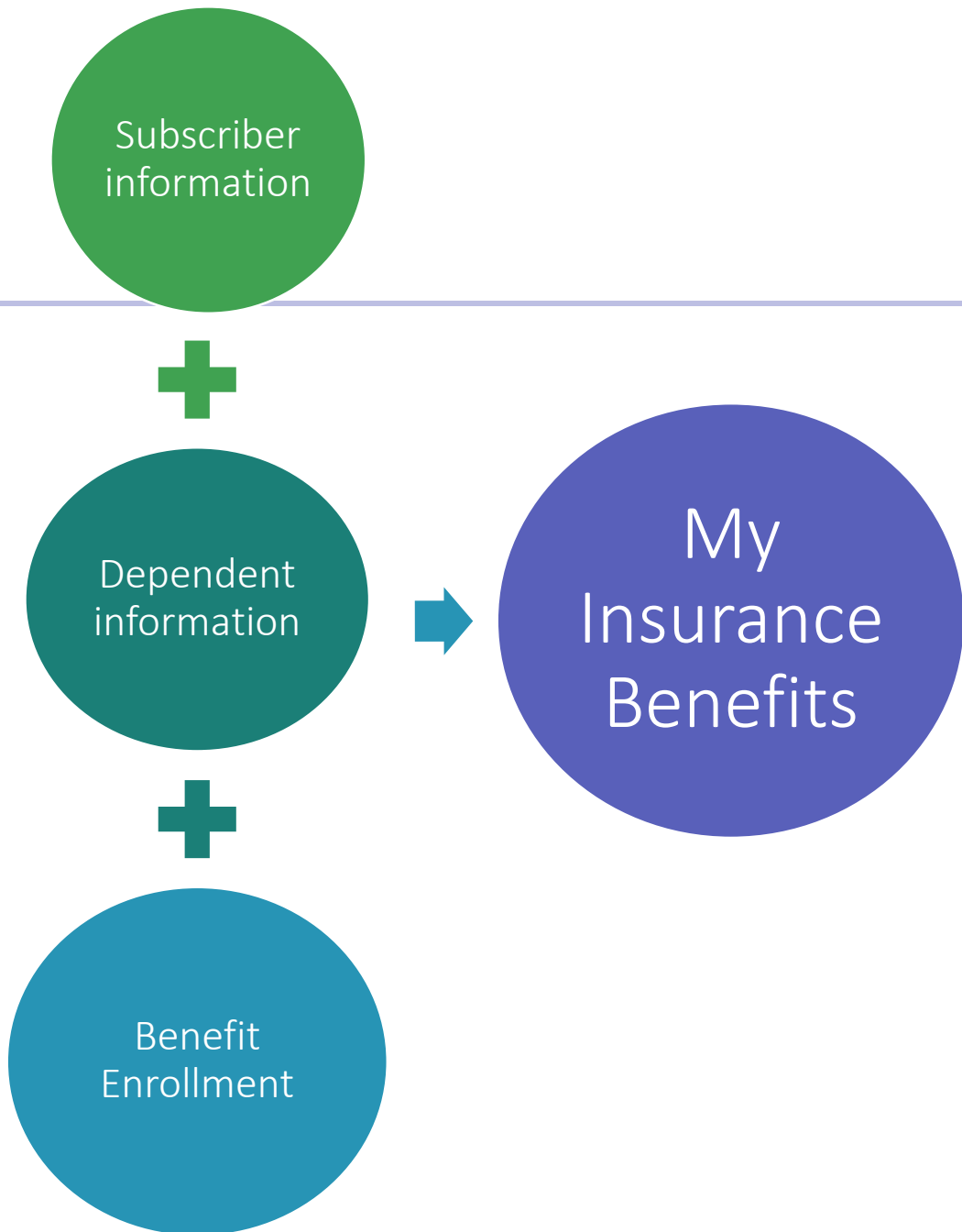


Key Dates and Member Impact

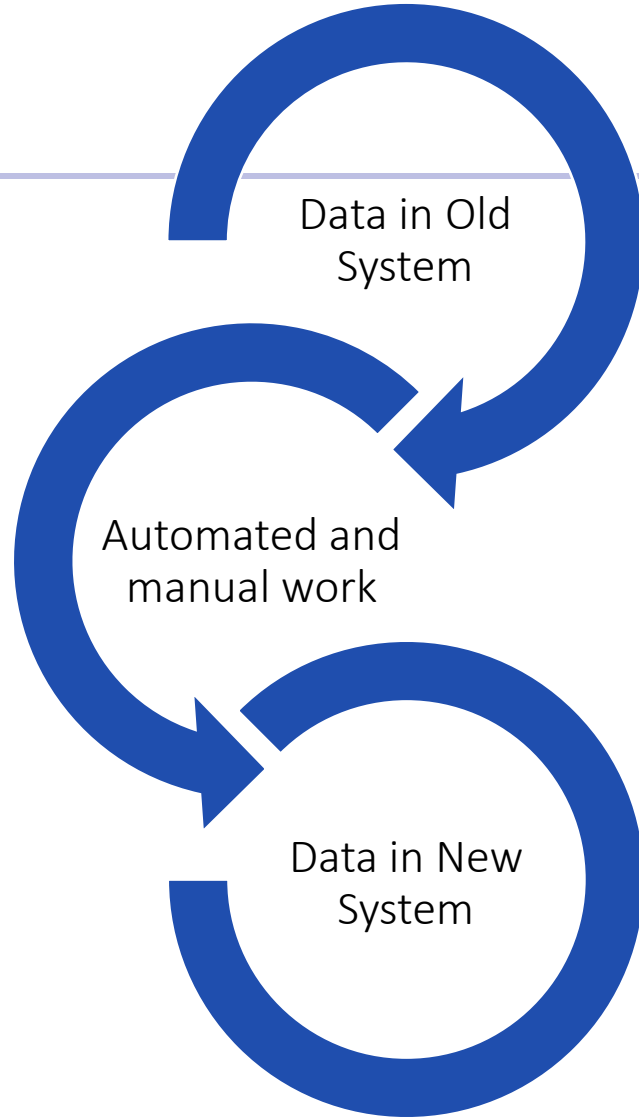


Temporary Processes

# What is Conversion?



# What is Cutover?



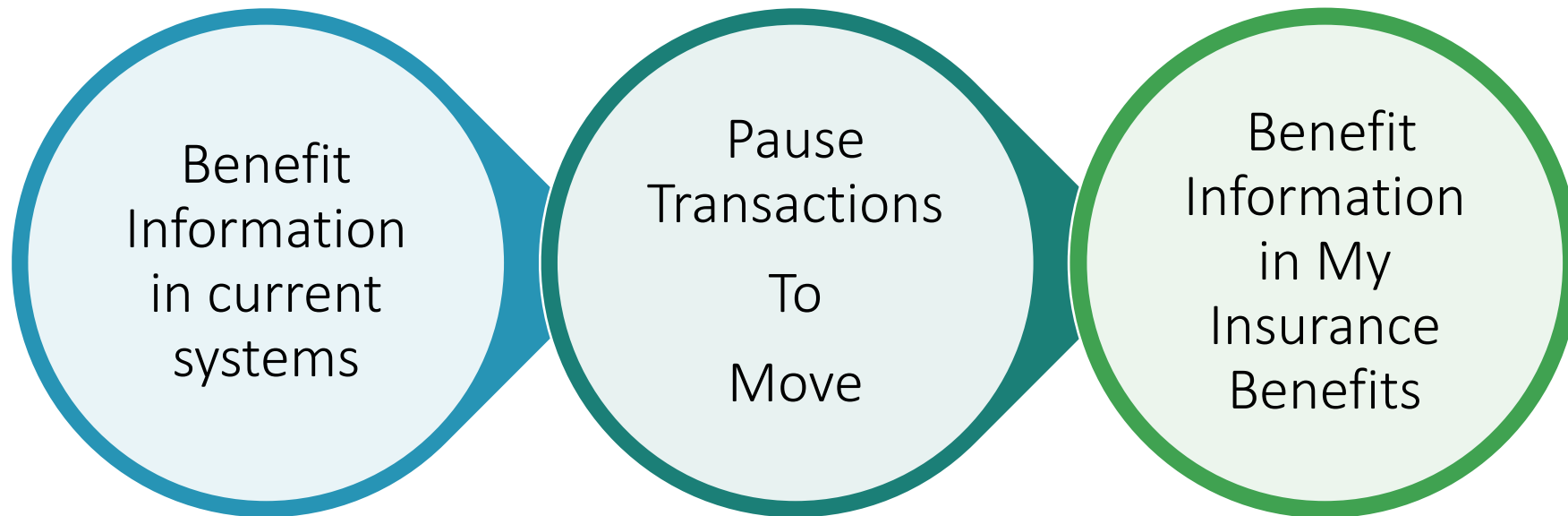
Data quality and integrity

Alignment of data between employers, ETF, and vendors

Accurate information

# Why will there be an enrollment freeze?

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# Shout out to DOA's Central Benefits Team



Tina Updike

Nikki Zaug

Danielle Tesch

Lisa Tesch

Meghan McKenna

Jamie Veit

Dana Gehrman

Joe Kelly

Mary Hasselquist

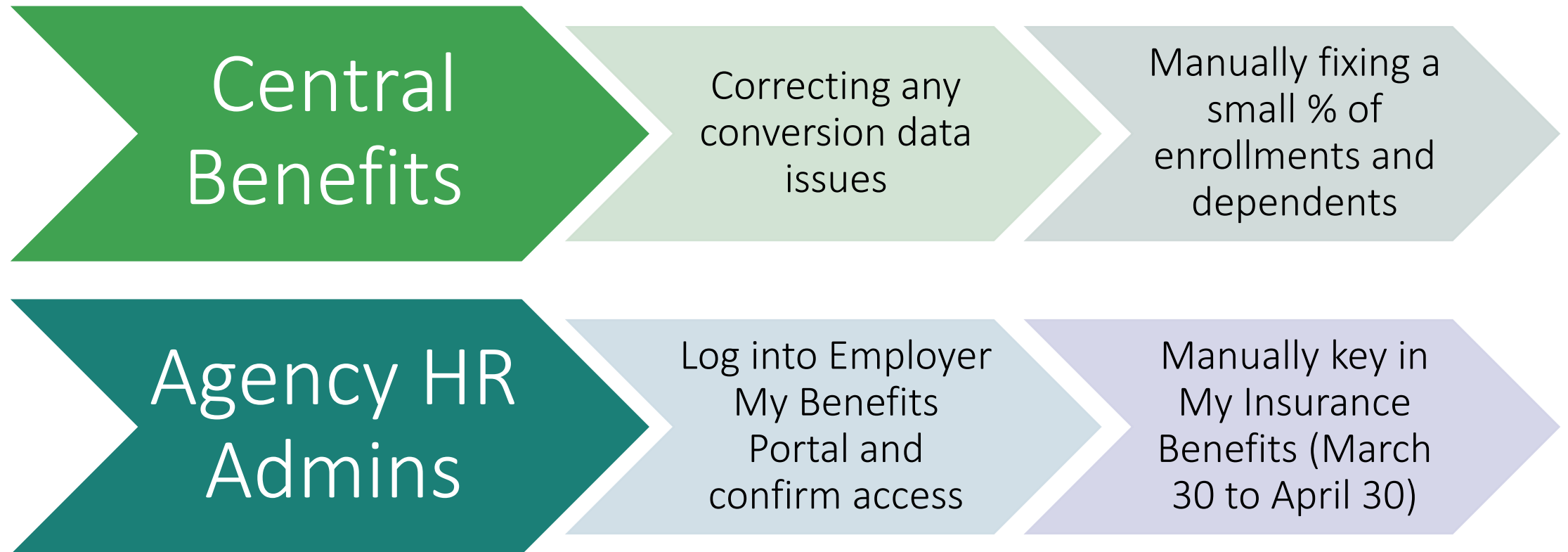
Julie Perry

# Critical Dates for Access and Health, Uniform Dental, and Pharmacy Coverage

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# Beginning on April 14, 2026



# Beginning on May 1, 2026

Members

Employees at State agencies who use STAR gain access to My Insurance Benefits

Agency HR Admins

Complete work in My Insurance Benefits such as reviewing documentation and enrollments, qualifying life events, etc.

ETF operates MEBS bridge

Transactions keyed to My Insurance Benefits will automatically copy over to MEBS through May 21

# On May 21 at 5pm

## FREEZE



No new enrollments for Medical, Uniform Dental Benefits, and Pharmacy



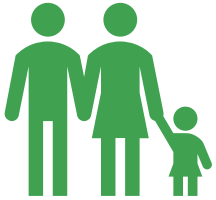
No File Transfer to Vendors: Health Plans, Delta Dental, and Navitus



Bridge from My Insurance Benefits to MEBs ends

# Freeze May 21 at 5pm to June 30

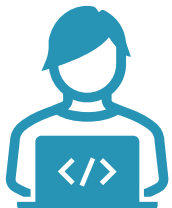
## During the Freeze



Members are covered with the contract they had on May 21st



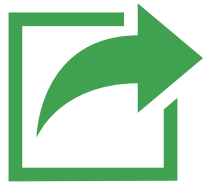
Newly enrolling members or dependents who need medical services will contact employer to request temporary process



ETF will request a manual enrollment from the vendor

On July 1, 2026

# All Employer Go-Live



Health enrollments and changes are sent to the Vendors



Retirees gain access to My Insurance Benefits



Voya will begin to administer COBRA contracts

# Critical Dates for Life, Supplementals, and ICI, Pre-Tax Savings

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- Life Insurance
- Supplemental Insurance
- Income Continuation Insurance (ICI)
- Pre-Tax Savings Accounts



# Life Insurance

## FREEZE



April 17th

Securian stops accepting Life Insurance applications requiring Evidence of Insurability (EOI)



May 6th

Securian stops accepting Life Insurance applications not requiring Evidence of Insurability (EOI)



**May 7<sup>th</sup> - New Life Insurance Rules go into effect:**

1. Coverage and premium effective date align
2. 30 days to automatically continue for retirees

# No Freeze for Supplemental Insurances

## Couple Dates to keep in mind



May 20<sup>th</sup> is the last day Delta Dental will accept applications



May 21<sup>st</sup> is the last day MetLife Vision will accept applications



Employers use the new ET-2339 application. Effective dates are based on normal rules. Supplementals continue automatically at retirement.

# No Freeze for Supplemental Accident, ICI, or Pre-Tax Savings for State Agencies

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Securian Accident Supplemental Plan – Employers continue to manage enrollments and changes



May 8<sup>th</sup> is the last day to submit ICI applications without Evidence of Insurability (EOI)



Coverage effective dates for pre-tax savings accounts will follow normal rules

# Touchpoint – Questions?

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# Enrollment Freeze and Emergency Processes

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- Dates for Awareness
- Why do we need emergency processes?
- Emergency Processes



# High Level Impacts of the Freeze

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- My Insurance Benefits will not send enrollment and disenrollment health insurance information to the vendors until July 1
- Most members will not be impacted by this in any way – current coverage continues and works normally
- People who are new hires, change plans, or add/remove dependents between May 22 and June 30 will be impacted
  - New employees with June 1st effective dates.
  - Employees with life events to add/remove dependents after May 21st and June
- Changes will be retroactively applied
- Effective dates are still critical to coverage
- The emergency process will support anyone who needs proof of insurance for care

# Employees will be enrolled in their current coverage during the FREEZE (May 22 – June 30)

May 2026							June 2026							
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	
					1	2		1	2	3	4	5	6	
								[Blue Bar]						
3	4	5	6	7	8	9	7	8	9	10	11	12	13	
								[Blue Bar]						
10	11	12	13	14	15	16	14	15	16	17	18	19	20	
								[Blue Bar]						
17	18	19	20	21	22	23	21	22	23	24	25	26	27	
					[Blue Bar]			[Blue Bar]						
24	25	26	27	28	29	30	28	29	30					
	[Blue Bar]								[Blue Bar]					
31														
[Blue Bar]														

The coverage on May 21st is the coverage during the freeze

New employees and life events to add dependents will be impacted

# Emergency Process for Medical and Pharmacy Needs

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## Why do we need an Emergency Process?

Vendors won't  
have enrollment  
data until July 1

Lives continue as  
we modernize  
our system

Confidence in  
Group Health  
Insurance

# Emergency Process for Medical and Pharmacy Needs Steps

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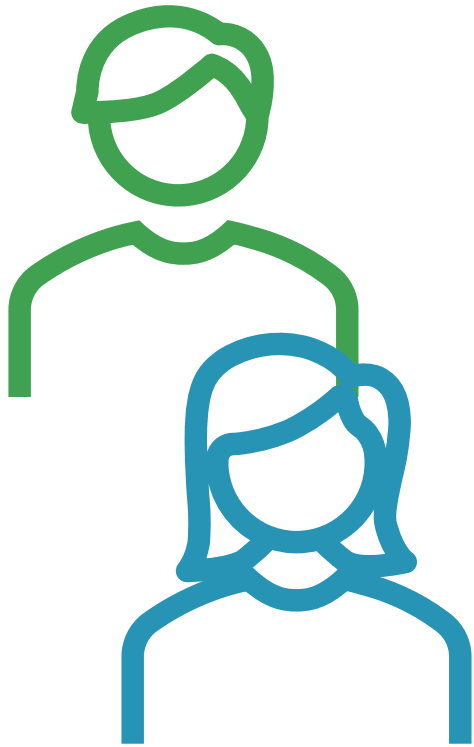
Employee must either enroll in My Insurance Benefits or complete an ET-2301 within the timeframe of their eligibility

Agency or Region Designee will open an Ivanti ticket

Anticipated turn around approximately 1 -3 business days

# Member Impact During Cutover and Freeze

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Members shouldn't notice any changes prior to the enrollment freeze dates

Members approaching retirement may hear about changes when they meet with ETF's Retirement Planning Office

Members may seek access to the Member Benefits Portal when notified about Statement of Benefits (April 2026)

Many members won't log in to My Insurance Benefits until Open Enrollment (Fall 2026)

# Touchpoint – Questions?

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# “Catch Up” in My Insurance Benefits

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- Beginning on April 14, 2026
- “Catch Up” keying
- Enrollments and changes submitted in Peoplesoft from March 30<sup>th</sup> through April 30<sup>th</sup>



# Important Date: Beginning on April 14, 2026

Agency HR  
Administrators

- Manually key
- Enrollments and changes
- March 30 to April 30
- In My Insurance Benefits

# What is the process?

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## Peoplesoft

- Reference employee's enrollment data



## My Insurance Benefits

- Search for employee
- Key benefits to match Peoplesoft



## Follow up

- With employees as needed
- DOA Central Benefits

# What are the steps to enroll in My Insurance Benefits?

ET-1110 HR Admin Guide provides step-by-step instructions

ET-1111 Provides direction on specific scenarios

## 10. Enrolling a Member in Benefits

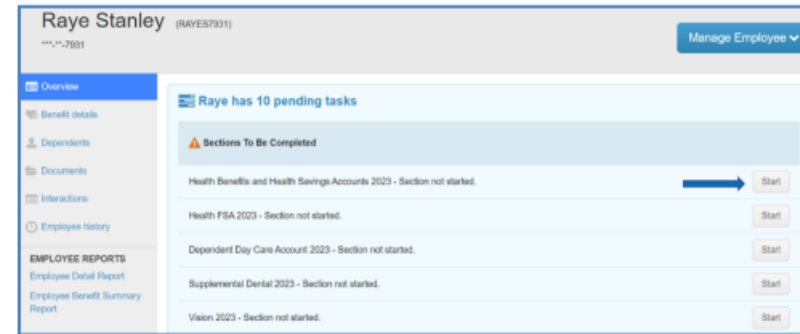
ETF's recommended practice is to encourage members to elect their own enrollment decisions themselves within My Insurance Benefits. This drives adoption and empowers our members to be independent and feel ownership of their own benefits.

If an employee cannot complete the enrollment themselves, electing benefits on a member's behalf consists of a series of steps. The types of information that you will enter may vary depending on the employer, the member, and the type of benefit available.

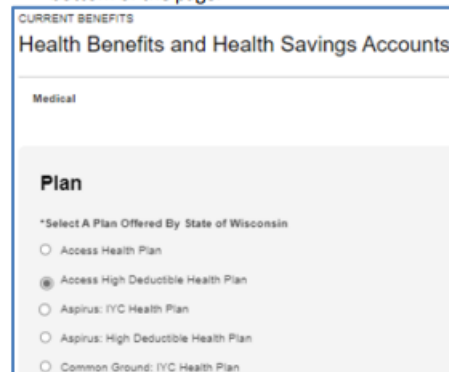
### 10.1. Adding a Medical, Dental, and Health Savings Account (HSA) Elections for State Employers

Follow the steps below to enroll a member in medical and dental coverage as well as a health savings account (HSA), if eligible. HSA options will only be available if the member is eligible and elects a high-deductible health plan (HDHP). The example provided is the most standard experience when a member is offered medical. These elections may not be visible to all members as members will only see the plans, they are eligible for through their employer.

1. Click **Start** for the medical offer in the *Sections To Be Completed* box on the member Overview page.



2. Select the medical plan in which the member is being enrolled or scroll to the bottom to *Decline Coverage*. Then click **Next** at the bottom of the page.



# Special Change Reason

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- Change reason “Update My Benefits for My Insurance Benefits Go Live”
- Only Central Benefits will use it for a limited time
- **Agency HR Admins do not use**, even if you have access
- ETF will audit this before May 1 and before July 1



# During the month of April

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Employees will  
continue to use  
Peoplesoft



Agency HR Admins will  
key enrollments in My  
Insurance Benefits  
starting April 14th

# Establish processes for your teams

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HR Admin tasks will post and require action

- Approval tasks generated by member activity
- Beginning May 1

Each Agency or Subunit will need to determine their own processes

- Maybe divide work by member/date/type of change (new or QLE)
- Run the Task List Report in My Insurance Benefits

# Task List Report



SWI University of Wisconsin System

Search by Name

## Data & Reporting

Your reports

**Standard reports**

Interim reports

Schedule reports

### Task List Report

**Formatting Options**

Report Format: Excel Compatible (CSV)

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

Include filter criteria in results

Additional Details: None selected

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

Sort by: Employee Last Name, First Name

Mask SSN in Report Results

**Filtering Options**

- Task List Section\* All selected (18) -
- 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 Program Option\* All selected (2) -
- Employment Status\* All selected (8) -

**Filtering Options**

- Task List Section\* All selected (18) -
- 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) -

Search

Select all

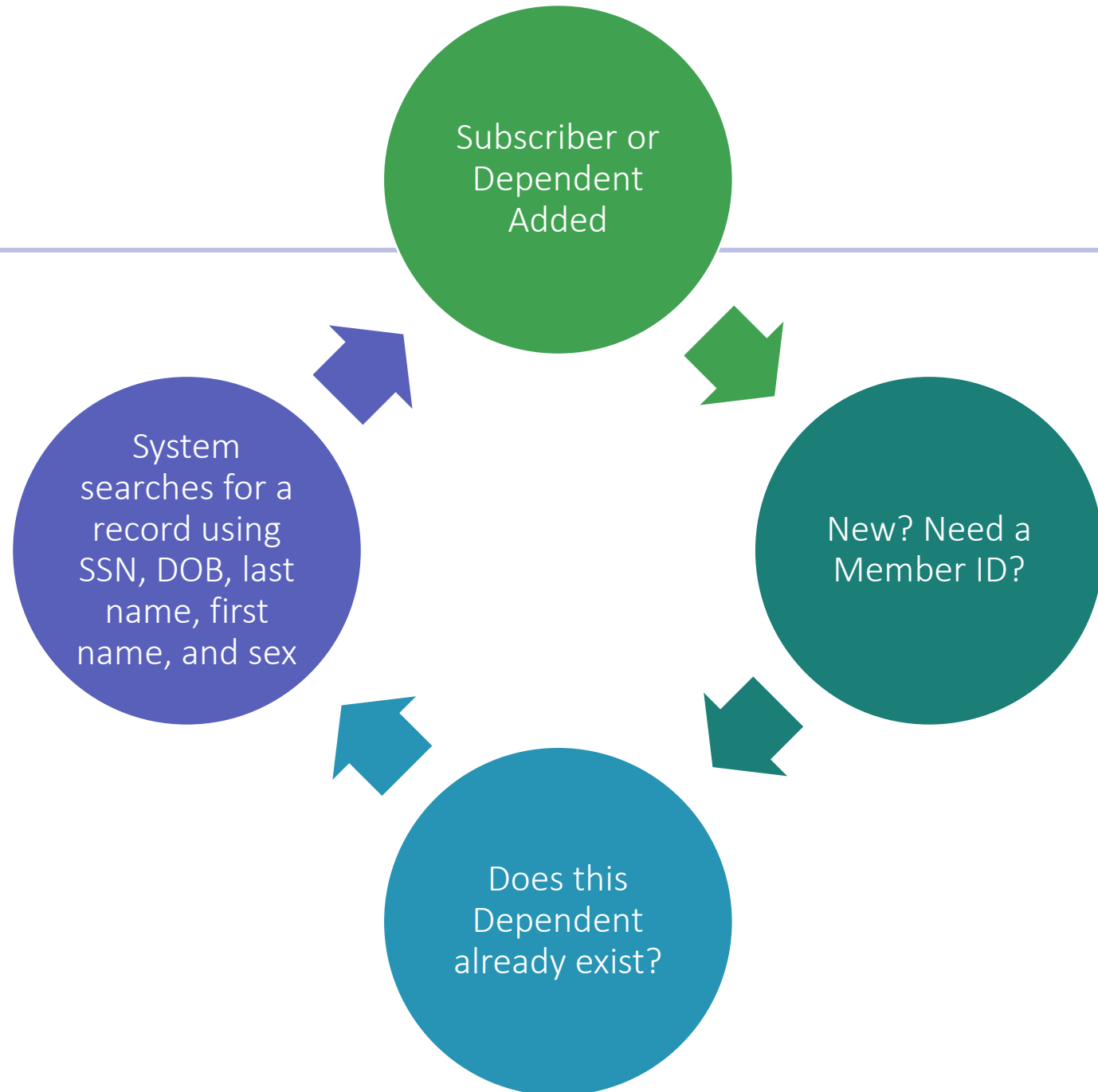
- 0001131-00001-00 - UW-Eau Claire
- 0001131-00002-00 - UW-Green Bay
- 0001131-00003-00 - UW-La Crosse
- 0001131-00004-00 - UW-Madison

# Task List Tool

## 6.1.1. Task Type Chart

Task *	Reason Codes	Owner	Action Required	Consequence, if not cleared
Calendar Set Change - Employees with Notifications	Calendar Set Change	HR Admin	Click on the Remove button	None
Employee or Dependent with Invalid Data	Effective Date Before Hire Date	HR Admin	HR Admin to verify correct hire date and file a case to BF requesting an eff date change as needed	Can prevent data from sending to vendors; may cause payroll issues if dates are spanning multiple months
Employee or Dependent with Invalid Data	Invalid Coverage Level Invalid Rate	HR Admin	HR Admin to verify correct info and file a case to BF requesting a change as needed	Can cause delays with data being sent to the vendors and on deduction files
Employee or Dependent with Invalid Data	Invalid Effective Date Missing Effective Date	HR Admin	HR Admin to file case for BF to review/correct record	Can cause delays with data being sent to the vendors and on deduction files
Employee or Dependents with Benefits to Review		HR Admin	Click on the Remove button	None
Employee with Denied Documents	Documentation Declined	<b>Employee</b> - If the employee is within their initial enrollment/ life event deadline  <b>HR Admin</b> - if the employee's initial enrollment/ life event deadline has passed	<b>Option 1:</b> Employee needs to resubmit new documentation  <b>Option 2:</b> HR Admin can decline requested changes or file a case requesting BF do this	Will <b>NOT</b> hold changes from sending on vendor files or deduction files; The corresponding approval task will hold changes
Employees and/or Dependents Require More Data		HR Admin	If shown for EOI pending -- No Action Needed Else, a case should be filed with BF	
Employees and/or Dependents with Invalid Data	Invalid category and plan combination	HR Admin	HR Admin to verify correct info and file a case to BF requesting a change as needed	Can cause delays with data being sent to the vendors and on deduction files

# Data Sync Task Requires HR Admin Review and Action



# Data Sync Tasks (continued)

If no member exists, it creates a new member

If one member exists, it is returned

If multiple members exist or a partial match is found, a conflict is returned generating a task

Benefitplace™

State of Wisconsin

Home

Employees

Data & Reporting

Message Center

Resources

Group Settings

Welcome back, Racheal Rolli!

Search by Name or SSN or UPID

To-do list

View by: All Tasks

Personal

15 Employees with Demographic Sync Failures

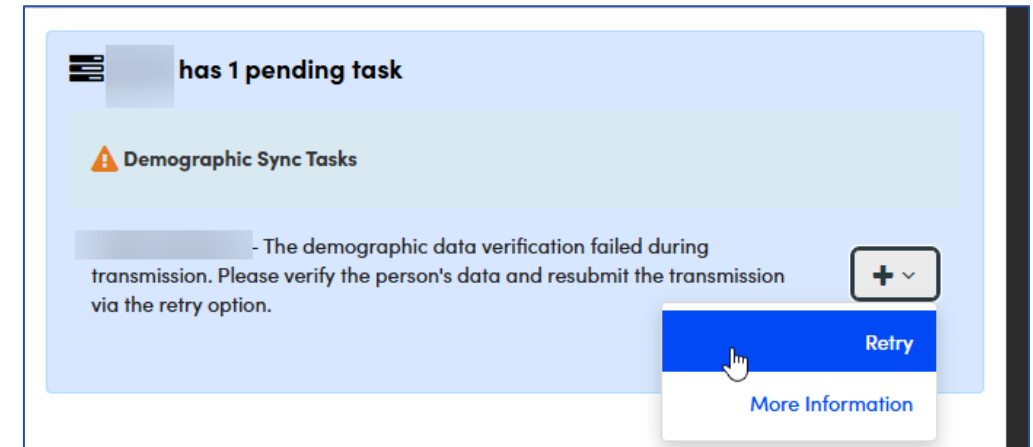
# How to resolve a Data Sync Task

Compare the data in My Insurance Benefits to data entered in MEBS or WEBS for that individual

If you find a discrepancy, update the data in the dependent tab in My Insurance Benefits to match

From the overview screen, click the + sign and select "Retry"

If it matches, the data sync task will be removed and there will be a Member ID associated with the dependent



# Common Reasons for Data Sync Tasks

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Married and Maiden names

Transposed numbers in SSNs and DOBs

Spelling error

Entering today's date instead of birth date

Punctuation other than spaces and hyphens

Unspecified Sex in Benefit Place or ETA

# Benefits will be entered and managed in My Insurance Benefits on May 1

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Employees will log into Member Role

Key enrollment and changes to benefits

Changes keyed in My Insurance Benefits between May 1 and May 21 will transfer over to MEBS via the Bridge

# Touchpoint – Questions?

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# Temporary Processes (May and June)

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- COBRA
- State to State Transfers
- Premium Waivers
- Active Employees Turning 70
- Terminations
- Retirements



# COBRA Offers May 1<sup>st</sup> – June 30<sup>th</sup>

ETF will send Specific Rights Notice

- Member will be aware of COBRA rights
- Advise member to reach out to employer if they wish to enroll

Member

- Will contact the HR Agency Administrator to say they want to enroll in COBRA

HR Agency Administrator

- Provides the COBRA application (ET-2311)
- After the member completes their portion, send it to ETF

VOYA

- COBRA notifications will move to Voya on July 1
- Will send a letter to the member to let them know they have taken over the administration of COBRA

# Temporary Process: State to State Transfers

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- Refer to the Employer IAS Procedures (ET-1111)
- Effective May 1 – June 30, 2026
- DOA and STAR are the only sponsors in My Insurance Benefits until July 1

## State sponsors include:

- STAR/Central Benefits
- UWs
- UWHC
- Quasi-State Agencies: WHEDA, WEDC, WHEFA, Beyond Vision, and Fox River Navigational Authority

# Temporary Process: Premium Waivers for Life & ICI

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- Refer to the Employer IAS Procedures (ET-1111)
- Effective May 1 – June 30, 2026
- ICI premiums are waived when a member starts receiving ICI benefit payments
  - See Chapter 8 “Claims Processing” in the state ICI administration manuals
  - Life insurance premiums can be waived if the employee becomes totally disabled while insured prior to age 70

# Temporary Process: Active Employee Turning 70

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- Refer to the Employer IAS Procedures (ET-1111)
- Effective May 1 – June 30, 2026
- When active employees enrolled in life insurance turn age 70, their life insurance benefits change.
  - When an employee turns age 70, My Insurance Benefits will generate an employer task called “Invalid category enablement.”
  - The employer will create the change reason “Update Life due to Age 70” in My Insurance Benefits for the employee.

# Employee terminations between May 22 and June 30

Enter termination in PeopleSoft up to 7 days in advance

- Deductions will stop
- Supplementals will be terminated
- Health, Dental, and Pharmacy will be terminated in My Insurance Benefits. The file will not be sent to the vendor until July 1
- Members lose access to My Insurance Benefits the day of termination

Communicate with employees that they do not have coverage

- Same rules apply, terminated employees' coverage end at the end of the month they are terminated
- This is most critical for people who are terminated between May 22 and May 31

# Retirements between May 22 and June 30

Members remained covered on the plan they were enrolled on as an active employee

Supplemental benefits will automatically continue

- This changes from “opt-in” to “opt-out” at retirement

Encourage members to print out the Employee Benefit Summary Report from My Insurance Benefits and advise there will be a delay in access to My Insurance Benefits

- Available in the member role and in the HR Admin role and by request to ETF after termination

Accumulated Sick Leave System is your new source for the Sick Leave Certification

Retirees will receive a COBRA offer – most should ignore because they are most likely eligible for a lifetime coverage with the Group Health Insurance

# Future State Processes starting July 1

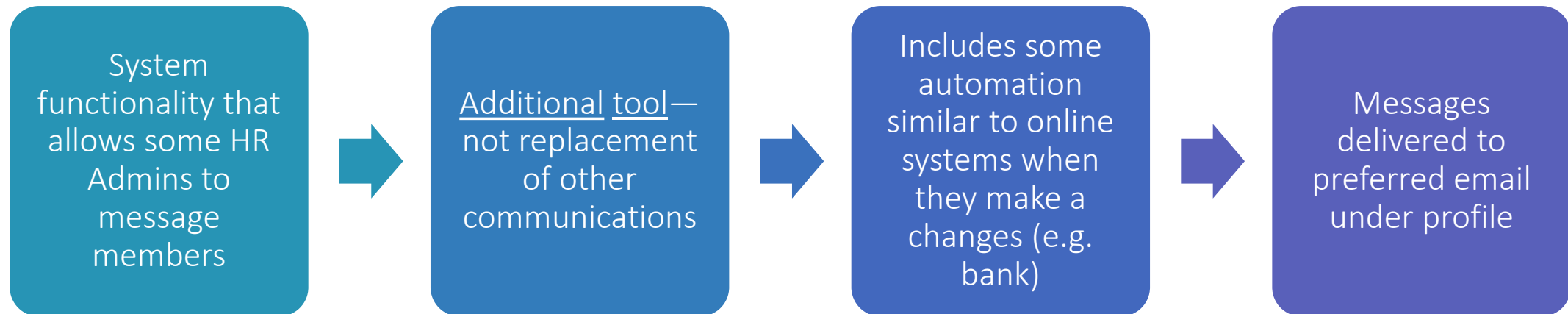
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- Targeted messaging
- Voya COBRA Administration



# What is Targeted Messaging?

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# What Targeted Messaging is NOT?

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Not a total replacement for other communications

Not a solution to all messaging needs

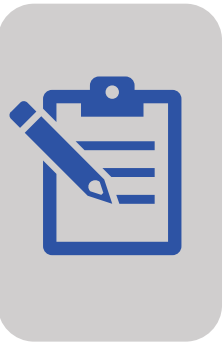
Not available to members without emails

Does not include way to reply (sender is “do not reply”)

- Include contact info in message

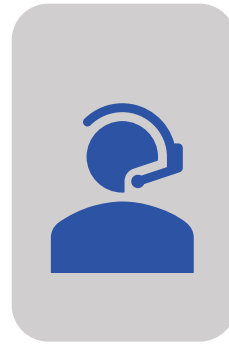
# Who will use targeted messaging?

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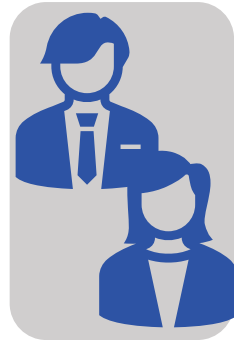


## ETF Product Owner Manages

- On-screen messaging
- Template messages
- Automated messages



ETF staff in EIU and BIS3



Employer HR Administrators

# 3 Types of Targeted Messages

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# Examples of Event Based Automated Messages

Initial enrollment

Documents required

Medicare eligibility

Company: SWI Training Sponsor - Locals Life & ICI Only

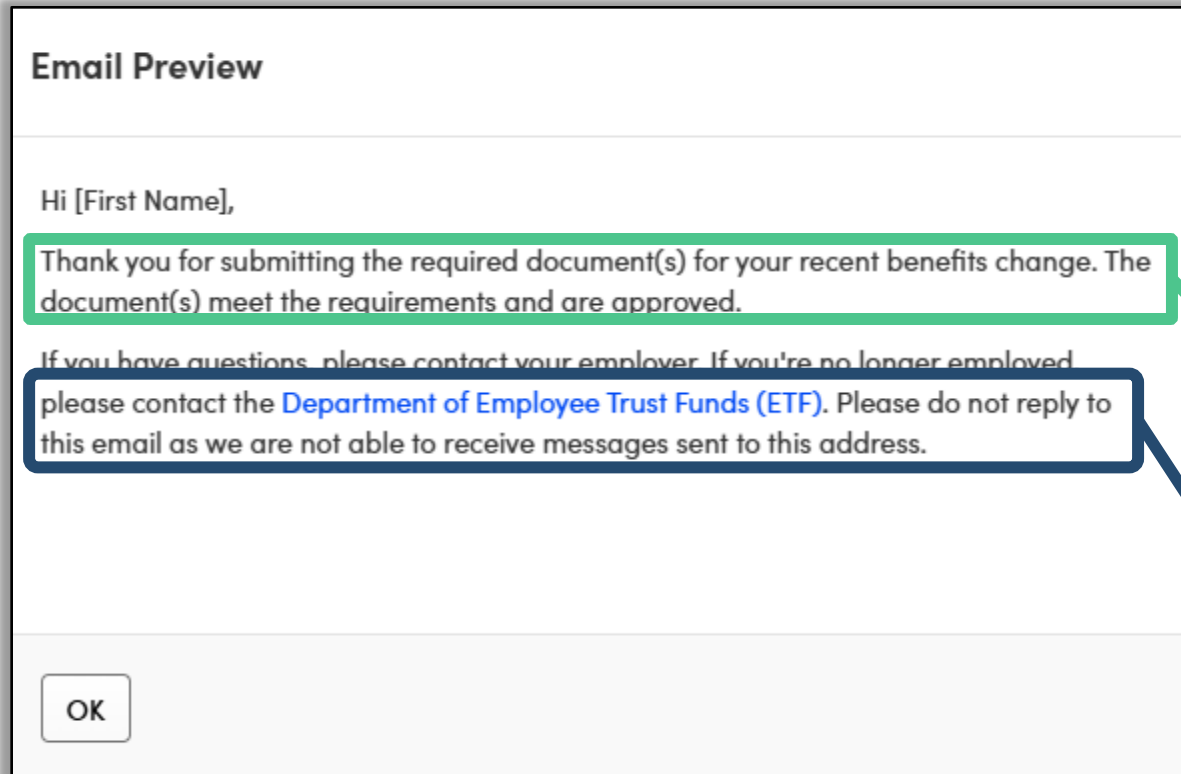
### Targeted Messages

Create and send on-demand, scheduled or event-driven messages to specific groups of employees based on data in Benefitplace.

Scheduled On-Demand **Event-Based and Confirmation** Message Reports

Enabled	Subject	Event	When To Send	Last Modified Date
✓	Benefit Elections Submitted Successfully	Initial Enrollment Confirmation	-	02/18/2025
✓	Benefits Updated Successfully	Member Benefit Update Confirmation	-	02/18/2025
✓	Personal Information Updated in My Benefits	Member Personal Update Confirmation	-	02/18/2025
✓	Benefit Elections Submitted Successfully	Open Enrollment Confirmation	-	02/18/2025
✓	Benefits Change(s) Due to Job Change	Cancelled due to category change	Immediately after	01/22/2025
✓	Incorrect Documents Submitted in My Benefits	Document Request Status - Declined - Invalid Documentation	Immediately after	01/22/2025
✓	Required Document(s) Not Received in My Benefits	Document Request Status - Declined - No Response	Immediately after	01/22/2025
✓	Resubmit Your Document(s) in My Benefits	Document Request Status - Declined - Unreadable Documentation	Immediately after	01/22/2025
✓	Required Document(s) Not Received by Deadline in My Benefits	Document Request Status - Declined - Untimely Response	Immediately after	01/22/2025
✓	Upload Required Document(s) in My Benefits	Document Request Status - Document is awaiting upload and/or approval	1 days after	01/22/2025

# Sample Automated Event-Based Message



Message sent immediately after event (document approval)

Message states what it is about

Do not reply so communication is one direction

# Where to locate messages sent (mass)

Under reporting, you can find a Messaging Detail Report

	A	B	C	D	E	F	G	H	I	J
	EMPLOYER_ID	LAST_NAME	FIRST_NAME	NOTIFICATION_TYPE	DATE_SENT	METHOD_SENT	SENT_TO	STATUS	STATUS_DETAILS	FROM_ADDRESS
1	8015	John1985	Doe2002	Initial Enrollment Notification	9/1/2024 0:19	EMAIL	John1985Doe2002EEID8015@gmail.com	Sent		MyBenefitsNoReply@etf.wi.gov
2	8141	John1859	Doe1876	Document Request Status - Document is awaiting upload and/or approval	9/1/2024 3:01	EMAIL	John1859Doe1876EEID8141@gmail.com	Sent		MyBenefitsNoReply@etf.wi.gov
3	6253	John3747	Doe3764	Document Request Status - Document is awaiting upload and/or approval	9/2/2024 3:02	EMAIL	John3747Doe3764EEID6253@gmail.com	Sent		MyBenefitsNoReply@etf.wi.gov
4	6252	John3748	Doe3765	Document Request Status - Document is awaiting upload and/or approval	9/2/2024 3:02	EMAIL	John3748Doe3765EEID6252@gmail.com	Sent		MyBenefitsNoReply@etf.wi.gov
5	6194	John3806	Doe3823	Start of Initial Enrollment	9/2/2024 16:39	EMAIL	John3806Doe3823EEID6194@gmail.com	Sent		MyBenefitsNoReply@etf.wi.gov
6	6192	John3808	Doe3825	Start of Initial Enrollment	9/2/2024 16:39	EMAIL	John3808Doe3825EEID6192@gmail.com	Sent		MyBenefitsNoReply@etf.wi.gov
7	6219	John3781	Doe3798	Start of Initial Enrollment	9/2/2024 16:39	EMAIL	John3781Doe3798EEID6219@gmail.com	Sent		MyBenefitsNoReply@etf.wi.gov
8	6190	John3810	Doe3827	Start of Initial Enrollment	9/2/2024 16:39	EMAIL	John3810Doe3827EEID6190@gmail.com	Sent		MyBenefitsNoReply@etf.wi.gov
9	6180	John3820	Doe3837	Start of Initial Enrollment	9/2/2024 16:39	EMAIL	John3820Doe3837EEID6180@gmail.com	Sent		MyBenefitsNoReply@etf.wi.gov
10	8050	John1950	Doe1967	Initial Enrollment Notification	9/2/2024 18:19	EMAIL	John1950Doe1967EEID8050@gmail.com	Sent		MyBenefitsNoReply@etf.wi.gov
11	8878	John1122	Doe1139	Document Request Status - Document is awaiting upload and/or approval	9/3/2024 3:01	EMAIL	John1122Doe1139EEID8878@gmail.com	Sent		MyBenefitsNoReply@etf.wi.gov
12	8877	John1123	Doe1140	Document Request Status - Document is awaiting upload and/or approval	9/3/2024 3:01	EMAIL	John1123Doe1140EEID8877@gmail.com	Sent		MyBenefitsNoReply@etf.wi.gov
13	9914	John86	Doe103	Document Request Status - Document is awaiting upload and/or approval	9/3/2024 3:01	EMAIL	John86Doe103EEID9914@gmail.com	Sent		MyBenefitsNoReply@etf.wi.gov
14	9913	John87	Doe104	Document Request Status - Document is awaiting upload and/or approval	9/3/2024 3:01	EMAIL	John87Doe104EEID9913@gmail.com	Sent		MyBenefitsNoReply@etf.wi.gov
15	8052	John1948	Doe1965	Document Request Status - Document is awaiting upload and/or approval	9/3/2024 3:01	EMAIL	John1948Doe1965EEID8052@gmail.com	Sent		MyBenefitsNoReply@etf.wi.gov
16	8051	John1949	Doe1966	Document Request Status - Document is awaiting upload and/or approval	9/3/2024 3:01	EMAIL	John1949Doe1966EEID8051@gmail.com	Sent		MyBenefitsNoReply@etf.wi.gov
17	8027	John1973	Doe1990	Document Request Status - Document is awaiting upload and/or approval	9/3/2024 3:01	EMAIL	John1973Doe1990EEID8027@gmail.com	Sent		MyBenefitsNoReply@etf.wi.gov

# How to verify message sent?

Under reporting → Locate “Messaging Detail Report for Failed Attempts”

- Note: This measures failed sent message attempts—*not* whether recipient read or opened

	A	B	C	D	E	F	G	H	I	J
1	EMPLOYER_ID	LAST_NAME	FIRST_NAME	NOTIFICATION_TYPE	DATE_SENT	METHOD_SENT	SENT_TO	STATUS	STATUS_DETAILS	FROM_ADDRESS
2	123456	RobTest	Danielle	Personal Information Update	3/12/2025 14:00	EMAIL		Not Sent: No Email on File	The recipient has no email on file.	MyBenefitsNoReply@etf.wi.gov
3	123456	RobTest	Danielle	Initial Enrollment Notification	3/12/2025 14:00	EMAIL		Not Sent: No Email on File	The recipient has no email on file.	MyBenefitsNoReply@etf.wi.gov
4										
5										
6										
7										

# Targeted Messaging Will Evolve

---



Input from ETF staff and employers will enhance messages over time

Future Enhancement:  
Boost number of email addresses & address accuracy

# Reminder: 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

# Changes in COBRA & Divorce

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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?

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# Plans for Member Access on May 1

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# Reminder: Employer and Member Portals

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- If you are a WRS employee, you will have access as an Agency HR Admin **AND** a Member
- Employer access is established via the ET-8928i
- As an employer, you'll only see the ETF applications you have permission to use
- Central Benefits Team members have access to the Employer Transaction Application User Interface
- As an employer, you only have access to your subunit data

# Reminder: My Benefits Portals

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

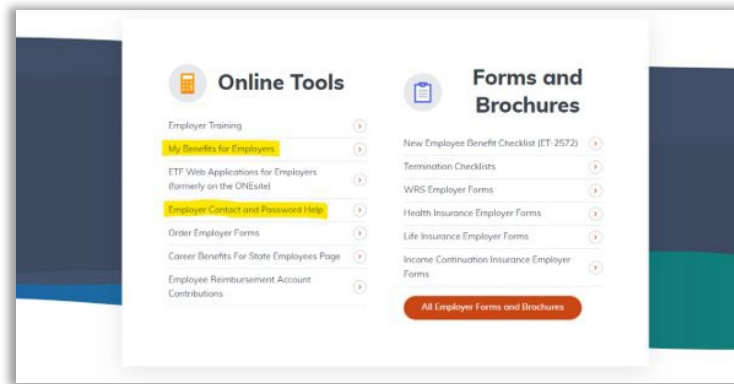
Access, view, and change their benefits

More apps planned for future

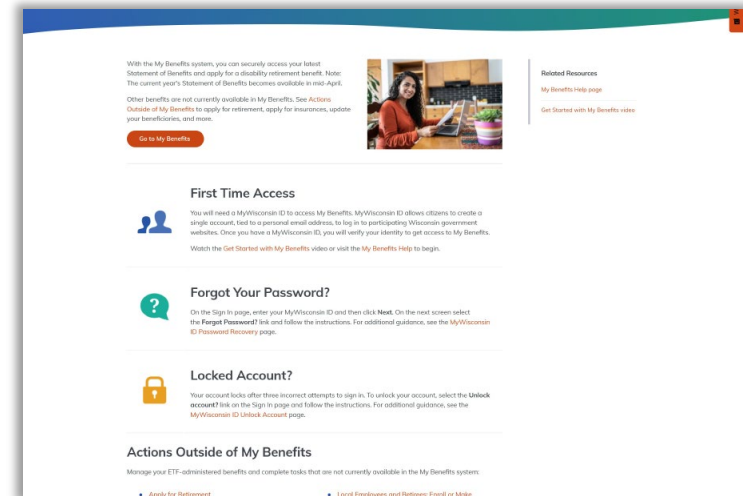
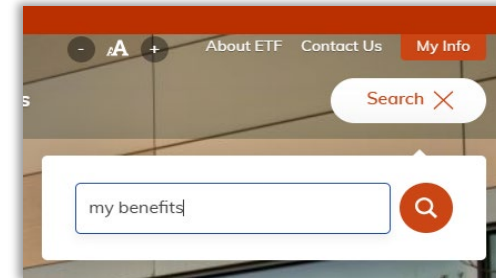
*NOTE: You will get locked out of portal after four unsuccessful log-in attempts and will need to contact support for help (shown later).*

# Meet Joe Smith!

## 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](mailto: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](mailto: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.

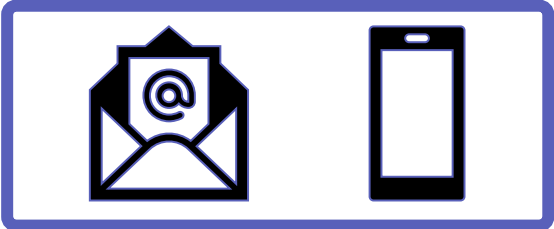
Complete form ET-8928

smithj + wxyz

IAM Username

smithj + wxyz + @wisconsin.gov

NEW to log in: "@wisconsin.gov"



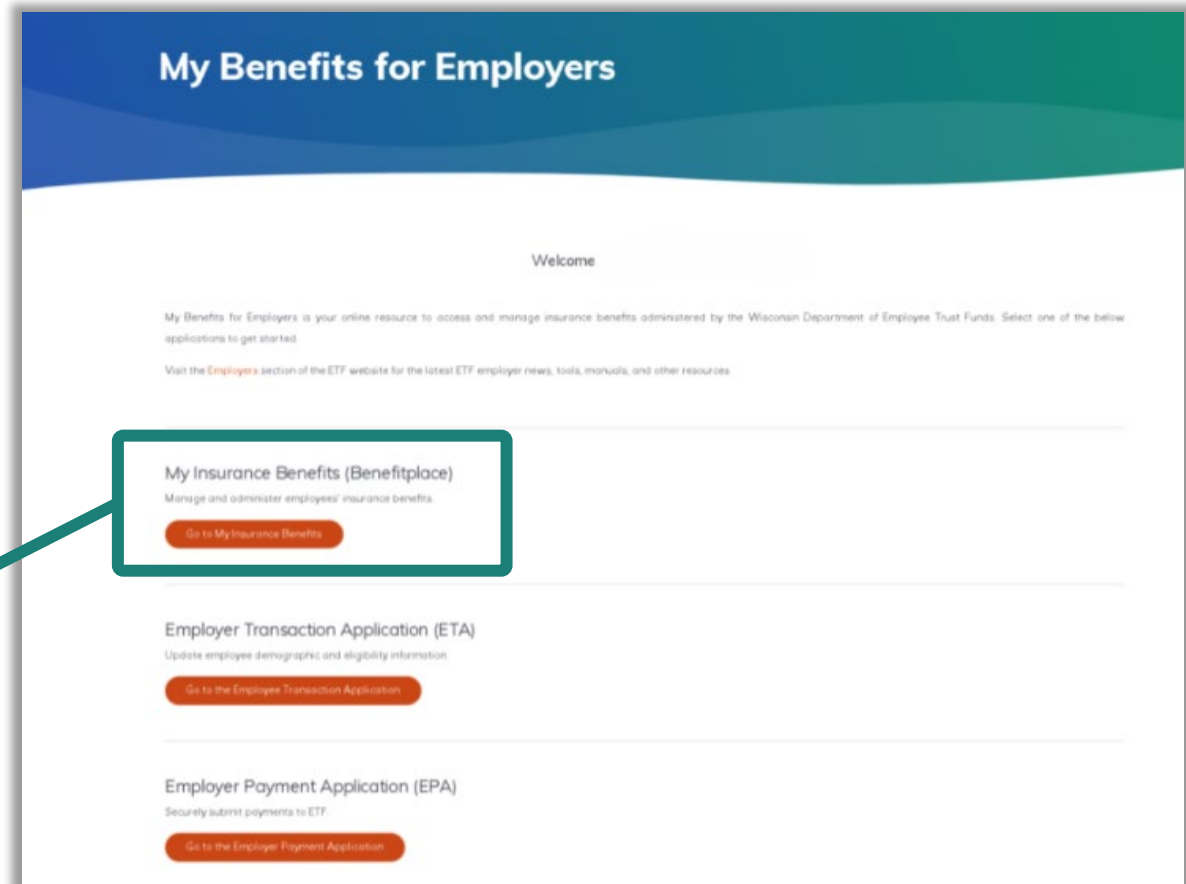
MFA required

# Joe's My Benefits for Employer Portal

Buttons to access different systems

- Only systems he can access will appear

My Insurance Benefits



# Reminder: Members access via My Benefits

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- Members will need a My Wisconsin ID to use My Insurance Benefits
- Personal email addresses are required because many people's relationship with WRS extends beyond one employer
- For new hires, allow 24-48 hours after the ETA XML file from Peoplesoft for access to My Insurance Benefits
- Terminations lose access to My Insurance Benefits the day of termination (HR Admins can enter up to 7 days in advance in PeopleSoft)

# Joe the Member

Create MyWisconsin ID



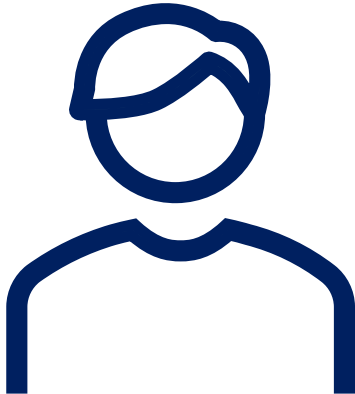
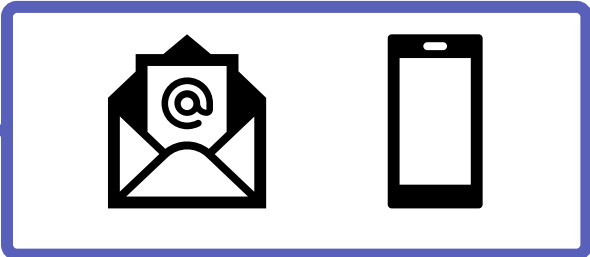
Use personal email address (.com, .net, .edu, .gov, .org, .us)

= a personal email address  
(ex. [joesmith@gmail.com](mailto:joesmith@gmail.com))

Contact DET help desk for assistance



Multi-factor authentication (MFA) required



[Job aid available!](#)

# Joe's My Benefits for Members Portal

Member applications

My Insurance Benefits

Annual Statement of Benefits

Web Forms

The screenshot shows the 'My Benefits for Members' portal interface. It features a dark blue header with the title 'My Benefits for Members'. Below the header, there are three main sections, each with a 'Go to' button:

- My Insurance Benefits:** Includes a 'Select Employer' dropdown menu and a 'Go to My Insurance Benefits' button.
- My Annual Statement of Benefits:** Includes a 'Select Your Annual Statement' dropdown menu with '2024 Annual Statement of Benefits' selected, and a 'Go to Annual Statement' button.
- ETF Web Forms:** Includes a 'Select Request Form' dropdown menu with 'Disability Retirement Application' selected, and a 'Go to ETF Web Forms' button.

Each of these three sections is highlighted with a colored border (green, blue, and purple respectively) that corresponds to the callout boxes on the left side of the slide.

# My Benefits Portal Resources and Troubleshooting

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## HR Admin

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



## Member

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



NOTE: HR Admin and Member access ends upon termination

# Communications for State Employees

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- In April, DOA is planning a messages encouraging members to access the My Benefits Portal with their My Wisconsin ID
- Go live messages on May 1, 2026
- Mentions in the WRS Newsletters from ETF
- Watch for member resources available on the ETF website – *Coming Soon!*



# What should HR Admins do May 1?

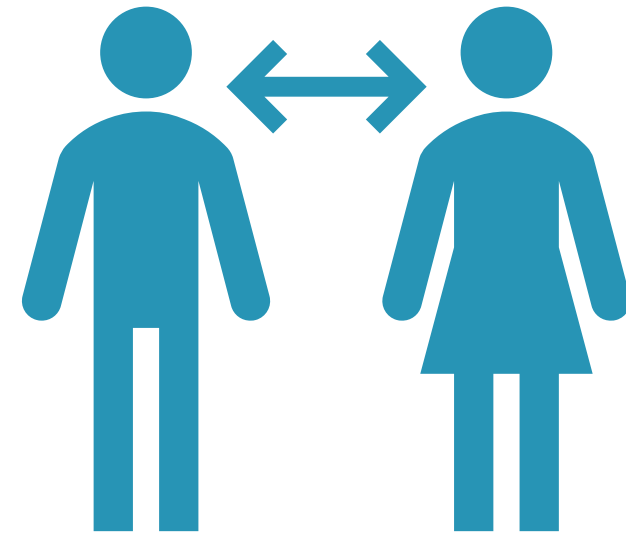
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- Check My Insurance Benefits daily
- Save helpful links to your browsers like the ET-1111 Employer Procedures
- Allow yourself more time than normal for tasks as you adapt
- Refine your subunit plan to address tasks
- Remember, multipart QLEs (like a life event + plan change) need to be entered over two days

# What should HR Admins tell employees?

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- Urge employees to access the My Benefits Member Portal (anytime!)
- Promote My Insurance Benefits with your employees (starting May 1)
- Encourage employees to enroll and submit qualifying life events using My Insurance Benefits



# My Insurance Benefits Resources Tab

## 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)*

The screenshot displays the Benefitplace HR system interface. The top navigation bar includes the Benefitplace logo, a user profile icon for 'HR AdminState002', and a 'View all employees' button. The main content area is divided into sections: 'Welcome, SWI Training Sponsor - State!', a search bar for 'Search by Name or SSN', a 'To-do list' section with a 'View by' dropdown menu, and a 'Benefit Participation' section. A red box highlights the 'Resources' tab in the left sidebar, and a red arrow points to the 'View by' dropdown menu in the 'To-do list' section.

# Resources for Agency HR Admins

- Insurance Manuals (Policy)
- My Insurance Benefits Guides (System)
- Employer Procedures (Step-by-Step Instructions)
- Employer Job Aids (One-topic Tools)
- Employer Toolkits – *Coming Soon!*
- Training Videos (including the Member Experience video)

The screenshot shows the 'My Insurance Benefits Resources for UW HR Admins' page. The header includes the 'etf' logo and navigation links for Benefits, Insurance, Retirement, WRS Performance, News, Member Education, and Employers. A search bar is located in the top right. The breadcrumb trail reads: Home / Employers / Insurance Programs / Insurance Administration System (IAS) / My Insurance Benefits Resources for UWs HR Admins. The main heading is 'My Insurance Benefits Resources for UWs HR Admins'. Below this, a paragraph states: 'This page is designed to support HR admins at the Universities of Wisconsin in assisting employees with My Insurance Benefits, an application within the My Benefits portal. Here, you'll find everything you need—user guides to employer manuals, forms, and more—to help your team navigate and make the most of the new system.' A prominent orange button labeled 'Log In to My Benefits for Employers' is centered below the text. A 'Jump to Section' list includes links for Job Aids, Open Enrollment Resource, My Insurance Benefits Guides and Employer Procedures, and UWs Employer Manuals. On the right side, there is a vertical menu titled 'Employers' with expandable sections for News for Employers, Wisconsin Retirement System, Insurance Programs, Employer Training, Wisconsin Deferred Compensation Program, Financial Information for Employers, and How to Become a...

# Resources for Members

- Member Guide
- Member Job Aids
- Employer Toolkits – *Coming Soon!*
- Videos (including the Member Experience video)

The screenshot shows the etf member portal interface. At the top, there is a navigation bar with a home icon, the etf logo, and tabs for 'Profile' and 'Benefits'. Below this, a dark blue section contains several menu items: 'Your benefits', 'Life Change', 'Learning Center' (circled in yellow), and 'Medicare'. To the right of this section, under the heading 'BENEFIT REPORTS', there is a link for 'Employee Summary Report'. Below the blue section, a white card displays a welcome message: 'Welcome back, Ana' followed by the date and time 'Tuesday, March 24 at 2:24 PM CDT'. To the right of the welcome message, there is a circular badge with the number '14' and the text 'ACTIVE BENEFITS', with a 'View benefits' link below it. At the bottom of the page, there is a dark grey bar with five icons and corresponding text: 'Change your current', 'Print your benefits', 'View your medicare info', 'Create dependent', and a partially visible icon for 'My account'.

# What support will members need?

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- Logging in to My Benefits for the first time
  - Encourage employees to create a My Wisconsin ID
  - Allow 24-48 hours for new hires to appear in the system
- Qualifying Life Events can happen at any time
- Support for emergency process to provide proof of insurance between May 22 and July 1
- Open Enrollment planned for Fall 2026

# Support for Employers during Cutover

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# Support Plan for DOA – Data Corrections

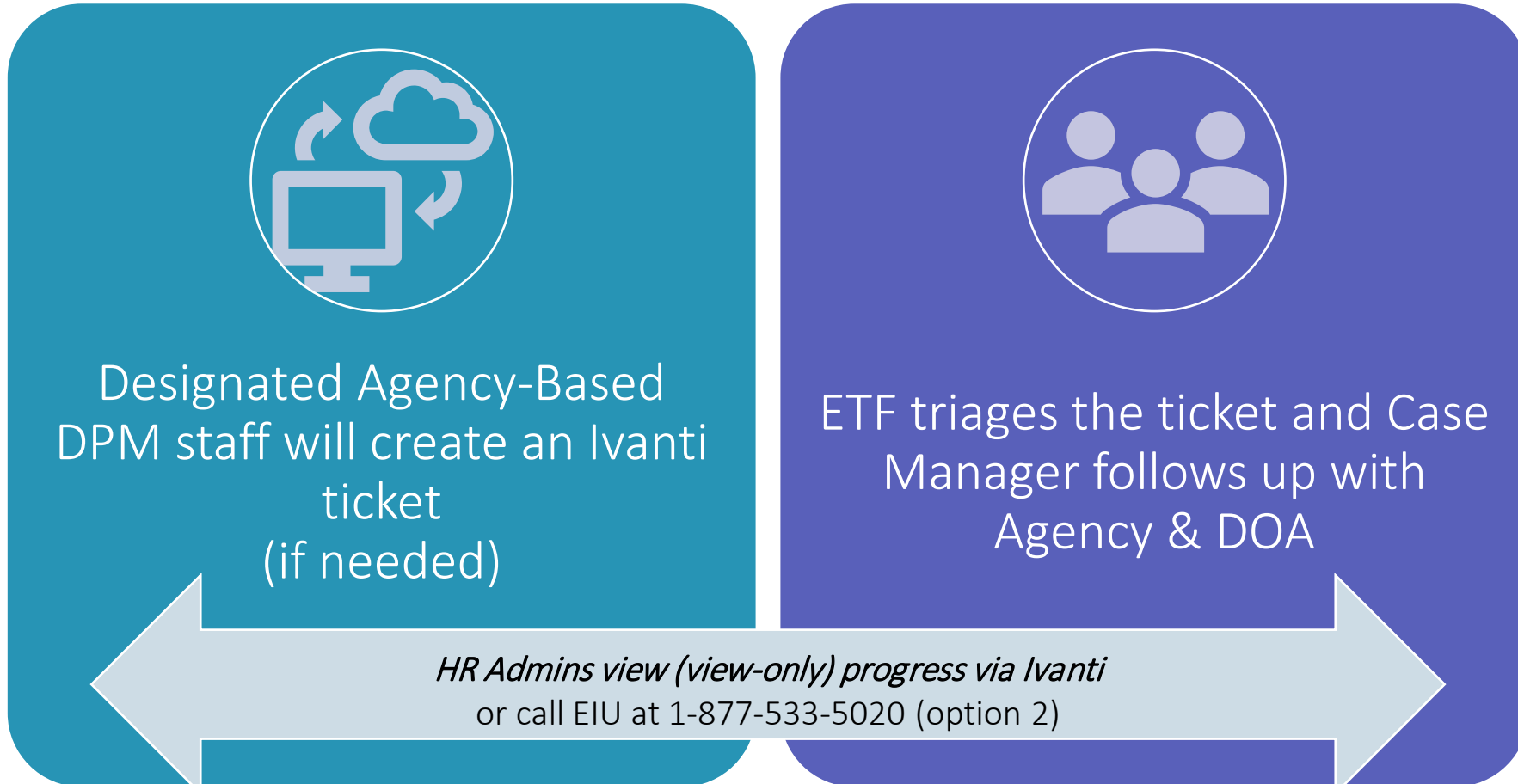


Create Jira Ticket for Data Corrections that cannot be passed on the ETA file

This would include data like:

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

# Support Plan for DOA – Enrollment Issues

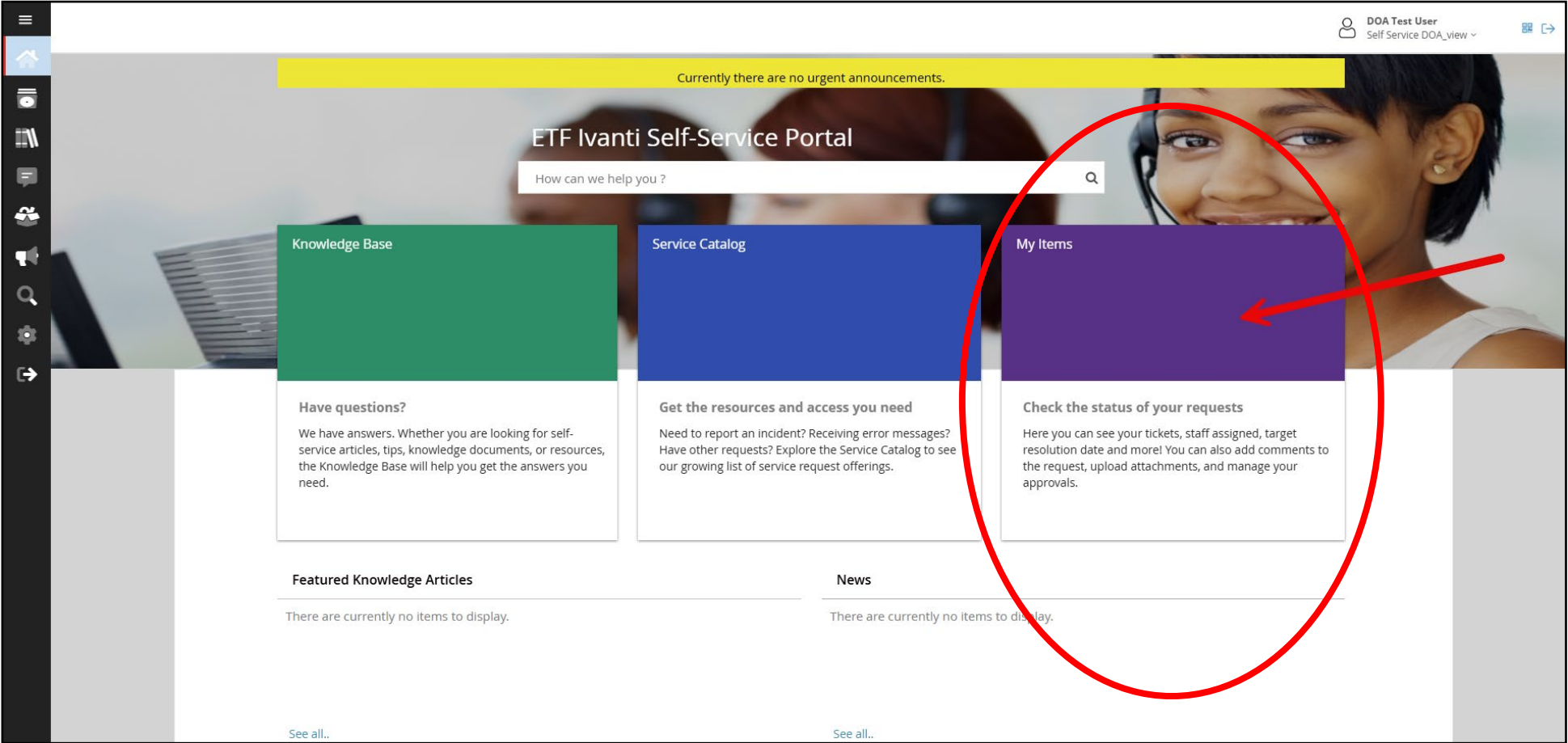


# Specifics for tickets during Cutover

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

# Tracking tickets in Ivanti



# Tracking tickets in Ivanti

The screenshot displays the Ivanti user interface for tracking tickets. On the left is a vertical navigation sidebar with icons for home, dashboard, reports, chat, incidents, notifications, search, settings, and a share icon. The main content area is titled "My Items" and includes a search bar with the placeholder text "Search". To the right of the search bar are three filter buttons: "Incidents - Active", "Sort By: ID", and "Sort Dir.: Desc". Below these elements, a single incident ticket is shown in a card format. The card contains an envelope icon, the ID "#80017", the title "Test Incident", a description "Example of description, additional summary of request", and a status indicator "Active" with a timestamp "11 minutes ago". In the top right corner of the interface, the user profile "DOA Test User" is visible, along with the role "Self Service DOA\_view" and a refresh icon.

# Touchpoint – Questions?

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# Feedback Survey

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# Thank you

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



ETF E-mail Updates



1-877-533-5020

