| Note: <u>Termination of Employment</u> requires that the employer provide the subscriber and all eligible dependents with a <i>Continuation-Conversion Notice</i> (ET-2311) within 5 days of the qualifying event. In addition, if a subscriber is <u>voluntarily canceling</u> coverage and the employee share of their premium has been deducted pre tax they must have comparable coverage to be eligible to voluntarily cancel outside of the <i>It's Your Choice</i> period. |       |        |              |                         |          |            |           |                  |                   |                         |                          |     |
|---|-------|--------|--------------|-------------------------|----------|------------|-----------|------------------|-------------------|-------------------------|--------------------------|-----|
| the qualifying event. In addition, if a subscriber is <u>voluntarily canceling</u> coverage and the employee share of their premium has been deducted pre tax they must have comparable coverage to be eligible to voluntarily cancel outside of the <i>It's Your Choice</i> period.  | mploy | erinfo | myMembers    | Health                  | Life     | Disability | WRS       | Other Benef      | its Help          | Log Off                 |                          |     |
| the qualifying event. In addition, if a subscriber is <u>voluntarily canceling</u> coverage and the employee share of their premium has been deducted pre tax they must have comparable coverage to be eligible to voluntarily cancel outside of the <i>It's Your Choice</i> period.  |       |        |              |                         |          |            |           |                  |                   |                         |                          |     |
| coverage to be eligible to voluntarily cancel outside of the It's Your Choice period.<br>ber SSN Member Contract Begin Event Received End Reason Coverage Add/Re<br>ID Status Date Date Date Reason Level Rov   |       |        |              |                         |          |            |           |                  |                   |                         |                          |     |
| ber SSN Member Contract Begin Event Received End Reason Coverage Add/Ret<br>ID Status Date Date Date Reason Level Roy   |       |        |              |                         |          |            |           | employee share o | f their premium h | as been deducted pre ta | x they must have compara | ble |
| ID Status Date Date Date Date Reason Level Roy  |       |        | loge to be e | igible to rolantarily e |          |            | e period. |                  |                   |                         |                          |     |
| ID Status Date Date Date Date Level Roy   | ow    | Member | SGN          |                         |          |            |           |                  |                   | Reason                  |                          |     |
| 12/20/2011 12/20/2011 12/31/2011  |       | member | 0011         | ID                      | Status   | Date       | Date      | Date             | Date              | Reason                  | Level                    | Row |
| 12/20/2011 12/20/2011 12/31/2011  |       |        |              |                         |          |            |           |                  |                   |                         |                          |     |
| OR ACTIVE a a select One a  | 1     |        |              | OR                      | ACTIVE - |            |           |                  |                   | Select One              | •                        | 0   |
|   |       |        |              |                         |          |            |           |                  |                   |                         |                          |     |
|   |       |        |              |                         |          |            |           |                  |                   |                         |                          |     |
|   |       |        |              |                         |          |            | Submit    | Clear            |                   |                         |                          |     |
| Submit Clear  |       |        |              |                         |          |            |           |                  |                   |                         |                          |     |
| Submit Clear  |       |        |              |                         |          |            |           |                  |                   |                         |                          |     |
|   |       |        |              |                         |          |            | Submit    | Clear            |                   |                         |                          |     |
|   |       |        |              |                         |          |            |           |                  |                   |                         |                          |     |
|   |       |        |              |                         |          |            | Submit    | Clear            |                   |                         |                          |     |
| Submit Clear  |       |        |              |                         |          |            |           |                  |                   |                         |                          |     |

Once you have logged in to the myETF Benefits System, navigate to the Health Insurance Termination Screen by clicking on the Health tab and then selecting Termination of Coverage.



- 1. Enter the SSN or Member ID of the person that is terminating health insurance coverage because of retirement. Also enter the end date and then select "Retirement" as the reason.
- 2. Click on the "Submit" button

Initial edits (age, etc.) will be performed. If any of the edits fail, a message will display. If the edits are successful, a new screen will display asking for the estimated balance of sick leave credit for the person along with the estimated base pay rate. This information will be used to verify adequate sick leave credit is available to pay the health insurance premium until the Accumulated Leave Certification (ET-4306) is submitted by the employer and subsequently processed by ETF staff.

| Emple | oyerinfo     | myMembers          | Health  | Life               | Disability       | WRS            | Other Be      | nefits Maint     | enance    | Help        | Log Off |        |                   |                 |
|-------|--------------|--------------------|---|--------------------|------------------|----------------|---------------|------------------|-----------|-------------|---------|--------|-------------------|-----------------|
|       | the          | qualifying event   | <u>f Employment</u> requi<br>. In addition, if a su<br>ble to voluntarily can | bscriber is volun  | tarily canceling | coverage and t |               |                  |           |             |         |        |                   |                 |
| Row   | Member       | SSN                | Member<br>ID  | CONTRACT<br>Status | DOB              | Begin<br>Date  | Event<br>Date | Received<br>Date |           | End<br>Date |         | Reason | Coverage<br>Level | Add/Remo<br>Row |
| 1     | DOE,<br>JOHN | 123456789          | OR 12345678   | ACTIVE 💌           | 11/01/1945       | 12/20/2011     | 12/20/2011    | 12/31/2011       | RETIREMEN | π           | ·       | FAMILY |                   |                 |
|       |              |                    |   | _                  |                  | Hours          | Pay           |                  |           |             |         |        |                   |                 |
|       |              |                    |   |                    |                  | Subr           | nit Clear     |                  |           |             |         |        |                   |                 |
|       |              |                    |   |                    |                  | -              |               |                  |           |             |         |        |                   |                 |
|       |              | 1 W Badger Rd Madi |   |                    |                  |                |               |                  |           |             |         |        |                   |                 |

3. Enter the estimated number of sick leave hours the person has along with the estimated base pay rate and click submit. This information will be used to verify adequate sick leave credit is available to pay the health insurance premium to continue coverage. The employer will need to complete the Accumulated Leave Certification (ET-4306) and send it to ETF for processing. The hours field is an estimate of what will appear on line A of the Accumulated Leave Certification (ET 4306). The Pay field corresponds to line D of the same form.

| <b>e</b>     | tf        |        |      | 11144-1224512 |     | efits Admin    |      |         |  |
|--------------|-----------|--------|------|---------------|-----|----------------|------|---------|--|
| Employerinfo | myMembers | Health | Life | Disability    | WRS | Other Benefits | Help | Log Off |  |

Note: <u>Termination of Employment</u> requires that the employer provide the subscriber and all eligible dependents with a *Continuation-Conversion Notice* (ET-2311) within 5 days of the qualifying event. In addition, if a subscriber is <u>voluntarily canceling</u> coverage and the employee share of their premium has been deducted pre tax they must have comparable coverage to be eligible to voluntarily cancel outside of the *It's vour Choice* period.

| Row | Member       | SSN |        | Member<br>ID | Contract<br>Status | Begin<br>Date | Event<br>Date | Received<br>Date | End<br>Date | Reason     |   | Coverage<br>Level | Add/Remove<br>Row |
|-----|--------------|-----|--------|--------------|--------------------|---------------|---------------|------------------|-------------|------------|---|-------------------|-------------------|
| 1   | doe,<br>John | 1   | OR     | 12345678     | ACTIVE             | 11/12/1987    | 12/20/2011    | 12/20/2011       | 12/31/2011  | RETIREMENT | • | FAMILY            | 0                 |
|     | NHOL         | 1   | UK 123 | 12345678     | ACTIVE             |               |               |                  |             | RETREMENT  |   | FAMILY            |                   |

- 4. If the calculation of the hours and base at least meet the threshold amount determined by ETF, the transaction will load, and the termination screen will display the entered transaction and the option of adding another row or removing a previously entered row.
- 5. Click the "Submit" button.
- 6. The confirmation screen will appear.
- 7. Verify the information is correct, and click the "Confirm" button to finalize the changes.

The system will automatically terminate the old contract and create a new contract for everyone who passes the edits and is between the ages of 55 and 65. All others who pass the edits (younger than 55 or older than 65) will be sent to a "PENDING SICK LEAVE CONVERSION" status under your EIN. There is no further action necessary on your part. This transaction will also move to ETF's Annuitant EIN. If this transaction needs to modified or cancelled, please contact Retiree Services at 1-877-533-5020. This will allow ETF staff to verify several scenarios which will be included in subsequent releases of this application, but are not yet available.

For instance, if the person is older than 65, ETF staff will research Medicare eligibility. If a person is younger than 55, ETF staff will manually verify the person indeed has protective service and other related criteria.

## Screen Messages:

- "Retirement option is not available for Graduate Assistants, select another reason to end coverage" Change the reason to "Termination of Employment."
- "Anticipated sick leave value must be at least (threshold amt), select another reason to end coverage" Change the reason to "Termination of employment.
- "Pending sick leave conversion" No action needed. This transaction will be processed by ETF after further manual review.
- "Active coverage ended, annuitant coverage pending" No action needed. This transaction will be processed overnight.