myETF Employer Reporting Confirmation Training

Manual Work Reports

Go To Training Attendee View

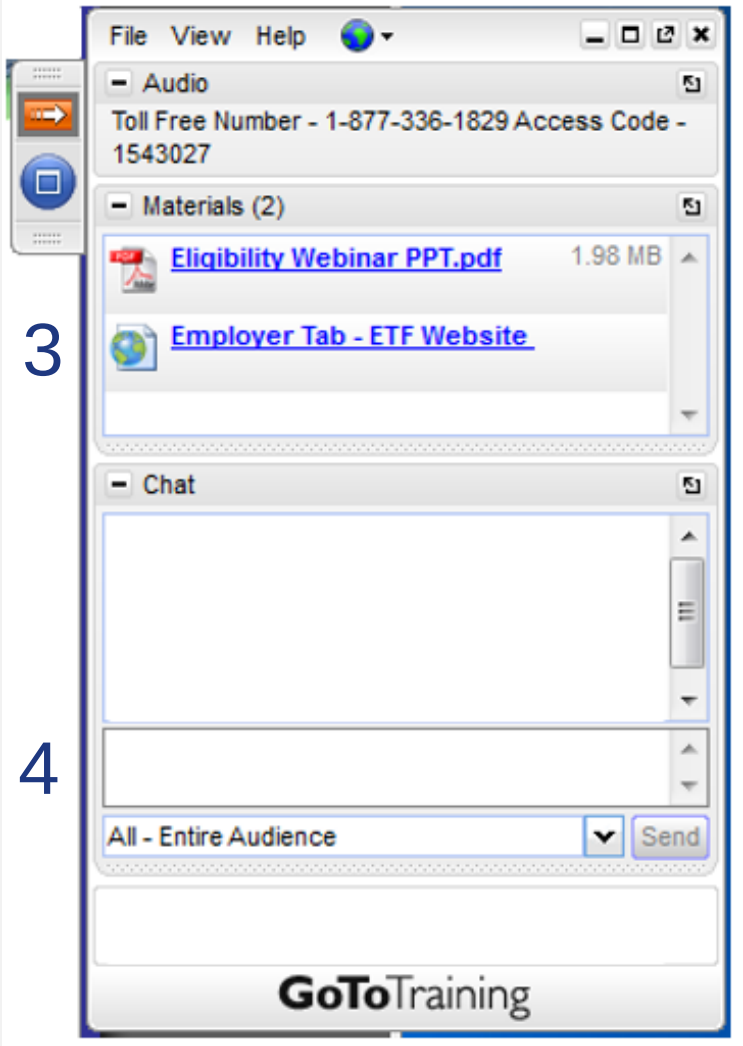
1. Panel Slider

   (View > Auto-Hide Control Panel to stop it from automatically disappearing)

2. Full Screen

3. Materials

4. Chat Box



What is Employer Reporting Confirmation?

- myETF Employer Reporting Confirmation is the process through which **all employers** will **test** their ability to report payroll information to ETF.
- You have **two methods** to report payroll information to ETF:
  - ✓ **File upload** to create a test work report
  - ✓ **Manually** generate a test work report
- Today's webinar will only focus on the second method – **Manual Work Report**.

myETF Payroll File Resource

- ✓ Includes important information on reporting wages, hours, and employee deductions
- ✓ Even if you intend to submit payroll information to ETF **manually**, you will need to reference the myETF Payroll File Resource

Today’s Objectives

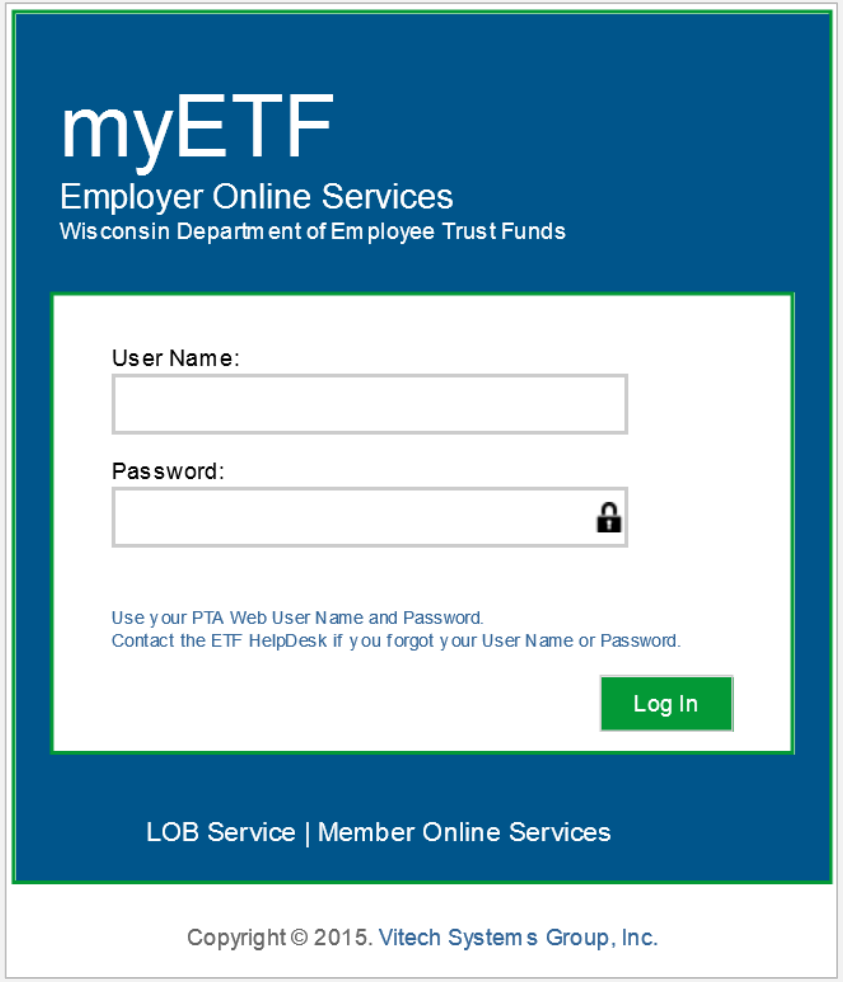
In today’s webinar, you will learn how to:

- ✓ Create or update a Reporting Cycle in myETF Employer Online Services
- ✓ Correct and submit a **manually generated** work report

Lesson #1 – Log in to myETF Employer Online Services

Key Concepts:

1) How to login to myETF
2) How to access the myETF URL
3) How to request a User Name and Password, if you do not have this info



myETF Employer Online Services Demo

Help | Mary Anderson | Change | Logout

Home | Employer Information | Billing Location | Roster | Accounts | FAQ

I Want To...

- Enroll an Employee
- Upload a New Payroll File
- Make Payment
- View my Accounting Details

Account Balances

	Fund Group Name	Due Date	Balance
1	Health	03/04/2017	-$2,000
2	Prior Service LS	03/04/2017	-$1,390
3	WRS	03/04/2017	-$98,834

ETF Links

- Joining Health Insurance for WRS Employers
- Joining Health Insurance for Non-WRS Employers
- Joining Life
- Joining ICI
- Joining WRS
- ETF Email Updates
- ETF Glossary
- ETF Related Links
- Local Bulletins
- Social Security Bulletins
- State Bulletins

Announcements

Scheduled Payments

	Fund Group Name	Payment Date	Payment Amount
1	Prior Service LS	12/16/2016	$6,000
2	WRS	10/05/2016	$1,372
3	WRS	10/07/2016	$3,210

Department of Employee Trust Funds | ETF Website | Privacy | Accessibility

Lesson # 2 - Reporting Cycles

Key Concepts:

1) Understand the key terms **Reporting Cycle** and **Payroll Cycle**
2) How to access the Reporting Cycle information in myETF
3) Match your Reporting Cycle to the data from your Work Report

Reporting Cycle Information

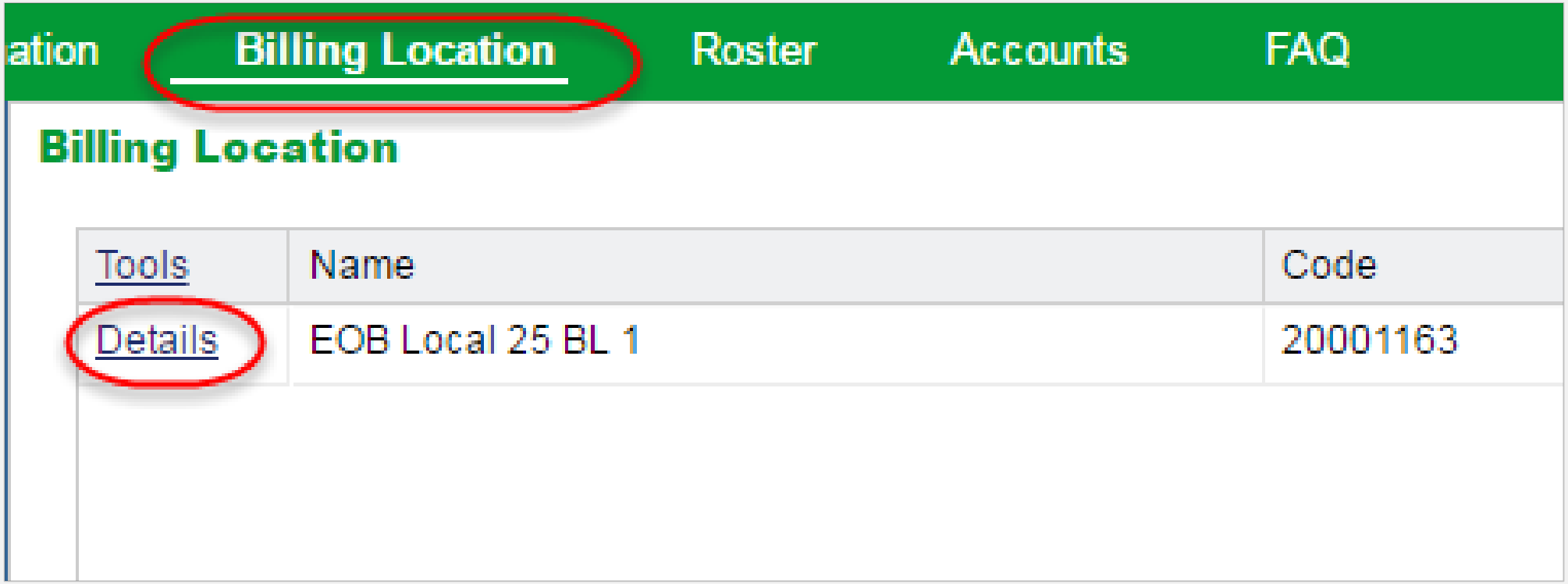
Add

Tools	Description	Start Date	Frequency	Cycle Start Date
Actions	C - Weekly	01/01/2017	Weekly	01/01/2017
Actions	C - Monthly	01/01/2017	Monthly	01/01/2017

Reporting Cycle - Details

✓Access the Billing Location via **Billing Location** >> **Details**

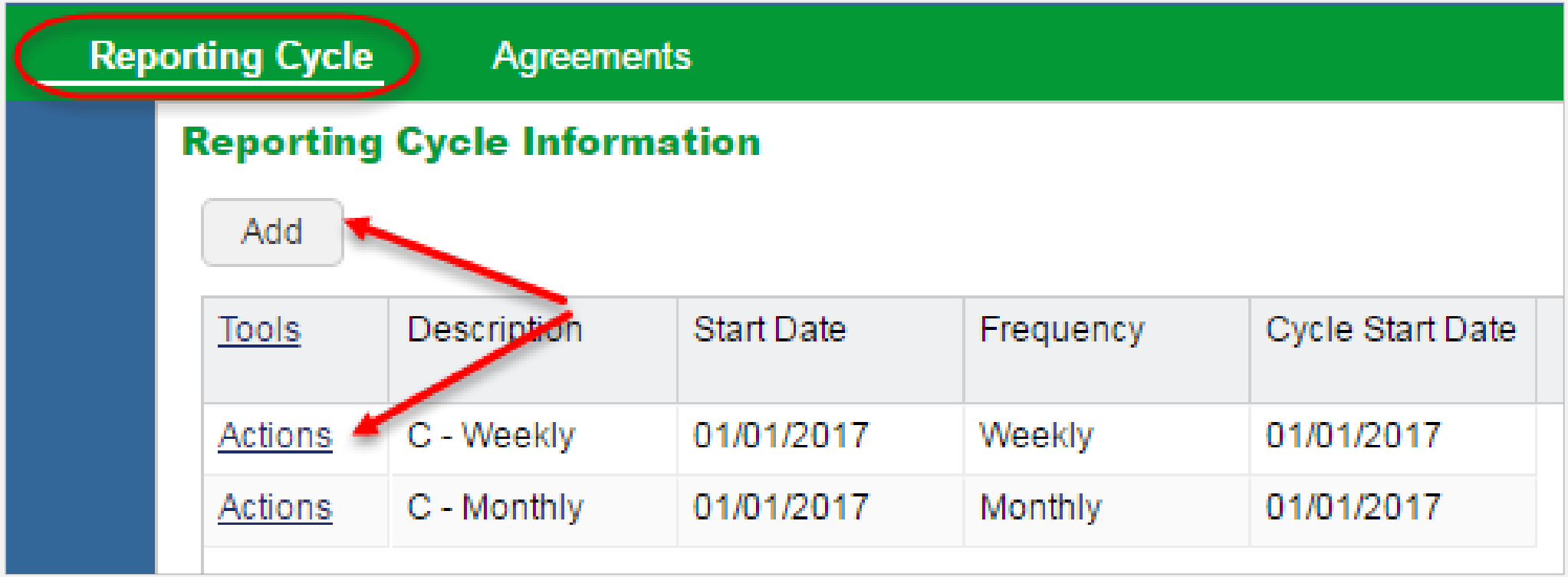
❖**Note**: You may see one or more Billing Locations. Select the correct one.



Reporting Cycle – Add or Update

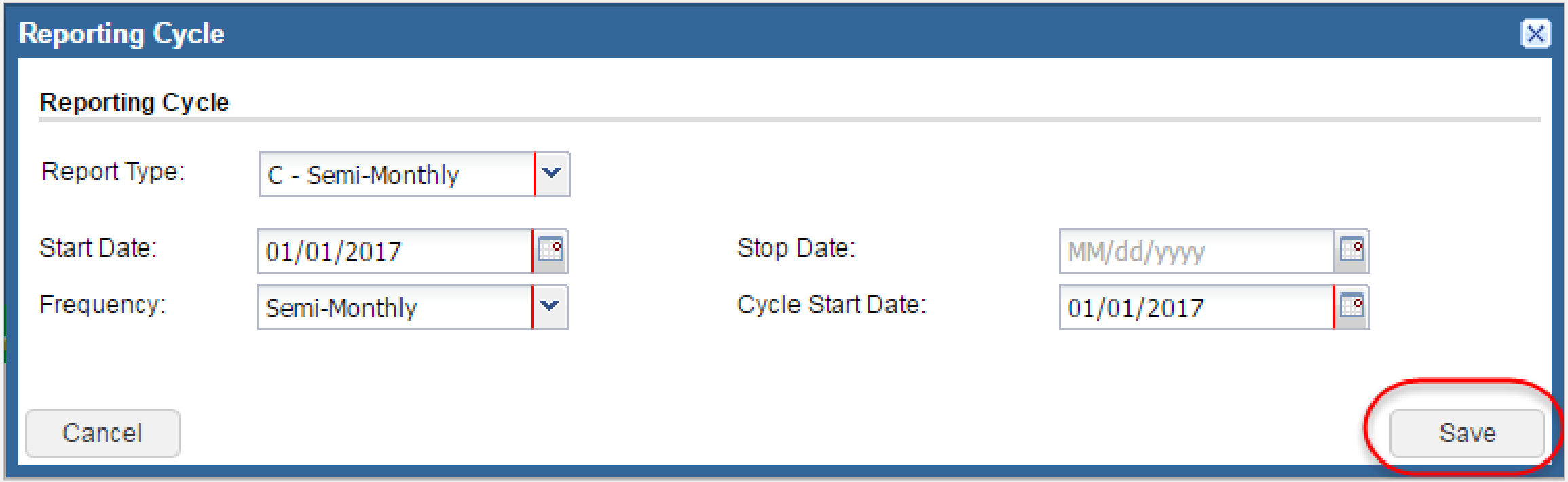
- ✓Access the Reporting Cycle via **Billing Location** >> **Details >> Reporting Cycle**

- ✓Click **Add** to create a Reporting Cycle or **Actions** to correct a Reporting Cycle



Reporting Cycle – Save and Confirm

- ✓Enter or Update the Reporting Cycle Information.
- ✓Click **Save** to continue. You will need to **Confirm** your changes.



Lesson #3 – Work Report Editor

Key Concepts:

1) Who is an existing member?
2) Generating a Manual Work Report
3) Using the Work Report Editor – Summary and Detail
4) Adding existing members and key information

Who is an Existing Member?

- ✓Active and Inactive WRS Eligible employees
- ✓Existing Members appear on the Roster tab

Home | Employer Information | Billing Location | Roster | Accounts | FAQ

Roster

Billing Location Name: 20001156 EOB Local 18 BL 1

Search:

Active Contract: ☑

Add New Hire

Enroll

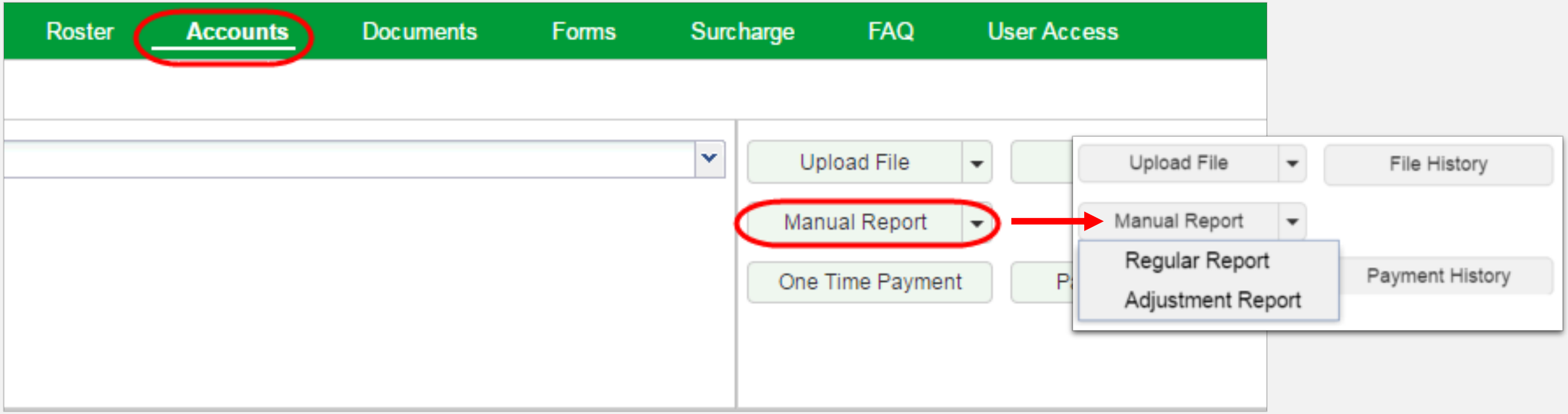
Check Eligibility

Tools	SSN	Name	Begin Date	End Date	Status	Job Category
Actions	XXX-XX-2226	Blake, Daphne	05/04/2017		WRS Eligible	General Employment
Actions	XXX-XX-2225	Dinkley, Velma	05/16/2017		WRS Eligilble	General Employment
Actions	XXX-XX-2223	Doo, Scooby	05/01/2017		WRS Eligible	General Employment
Actions	XXX-XX-4018	Graves, Julian	01/01/2017		WRS Eligible	General Employment
Actions	XXX-XX-2227	Jones, Fred	05/09/2017		WRS Eligible	Teacher

Generating a Manual Work Report

Generate a Work Report from **Accounts >> Manual Report**

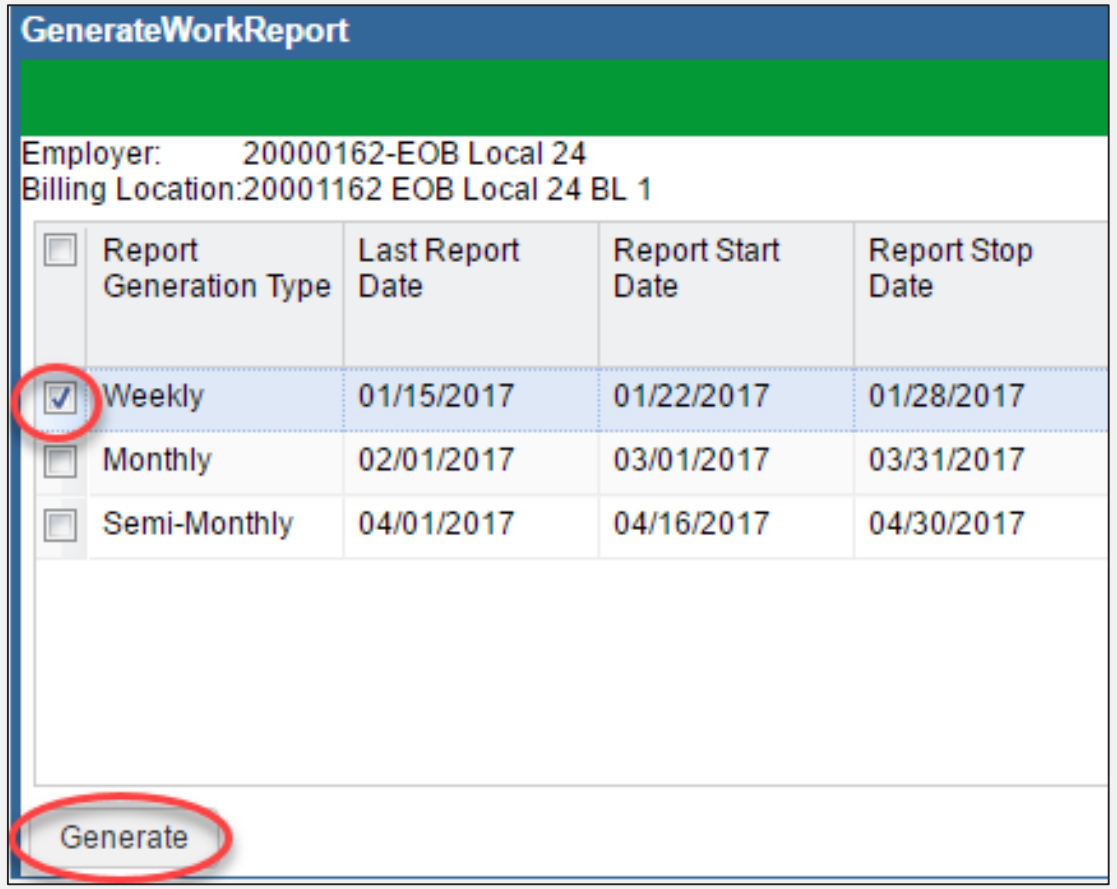
- ✓Click the Manual Report button
- ✓Select Regular Report



Generating a Manual Work Report

From the Generate Work Report pop-up:

- ✓ Select one of the available Reporting Cycles
- ✓ Click the Generate button



Work Report Editor - Summary

Work Report Editor

Save | Apply | Cancel

Employer:	Test Employer	Report Type:	Regular	Report Period:	05/01/2017 - 05/31/2017	# of Participants:	1
Billing Location:	20036859 Test Employer	Report Status:	Initial	Identifier:	WR: Monthly, 05/01/2017 - 05/31/...	# of Rows:	1
Trans #:	879316						

Summary | Detail

Date Received:	MM/dd/yyyy	Created By:	MARY on 05/02/2017	Pay Period Year:	
Due Date:	MM/dd/yyyy	User Released:		Payroll Date:	MM/dd/yyyy
Report Source:					

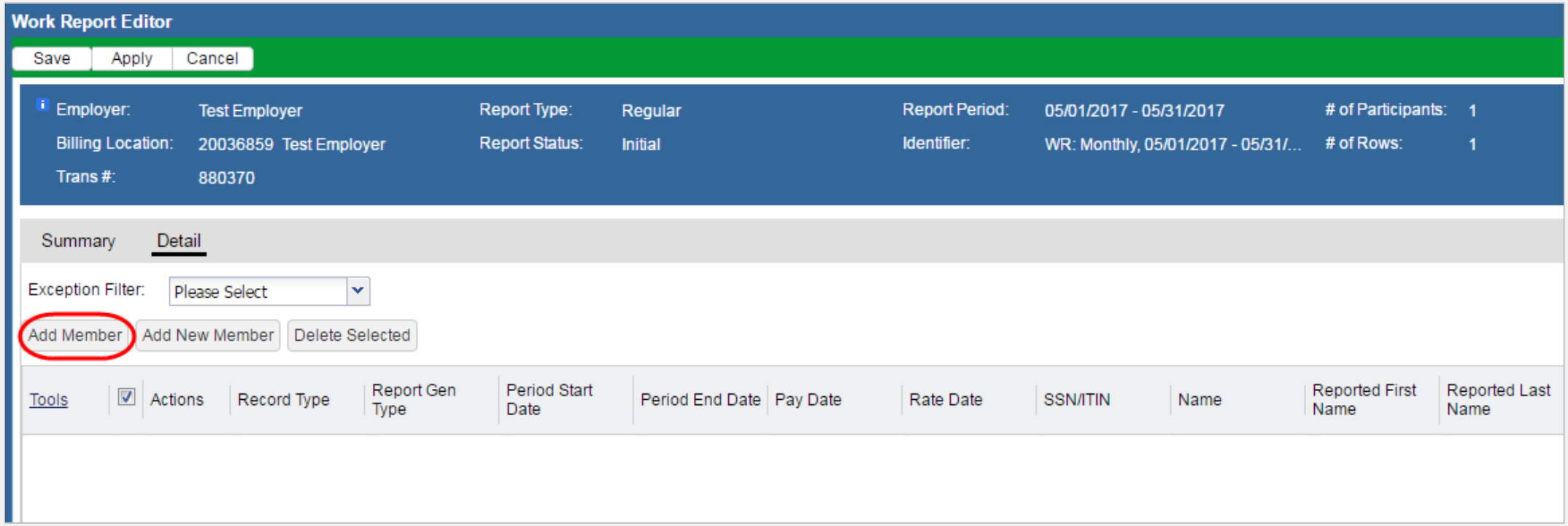
Financial Summary

Fund Name	Due Calculated	Amount Paid	Amount Owed
Employer Required	$0.00	$0.00	$0.00
Employee Required - EE	$0.00	$0.00	$0.00
Employee Required - ER	$0.00	$0.00	$0.00
Addl EE	$0.00	$0.00	$0.00
Addl ER	$0.00	$0.00	$0.00
	$0.00	$0.00	$0.00

Work Report Editor - Detail

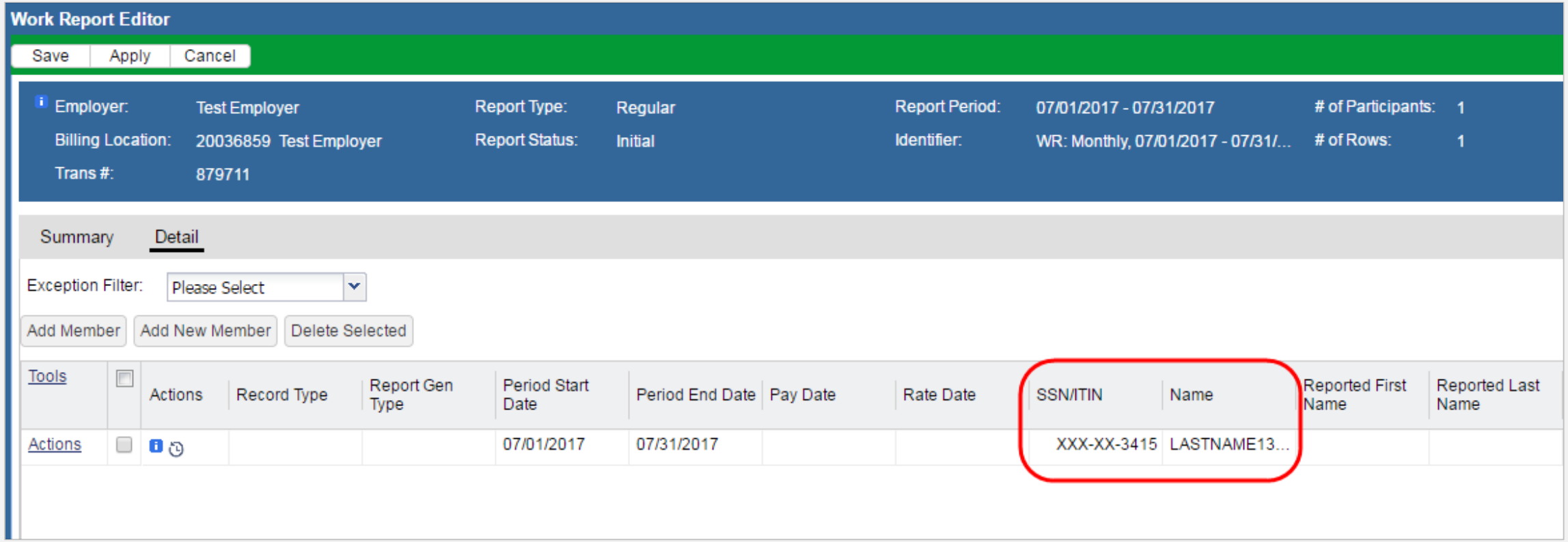
❖**Note**: The Work Report Editor Detail grid will be blank until you add your members

✓Use the **Add Member** button to update information on existing members



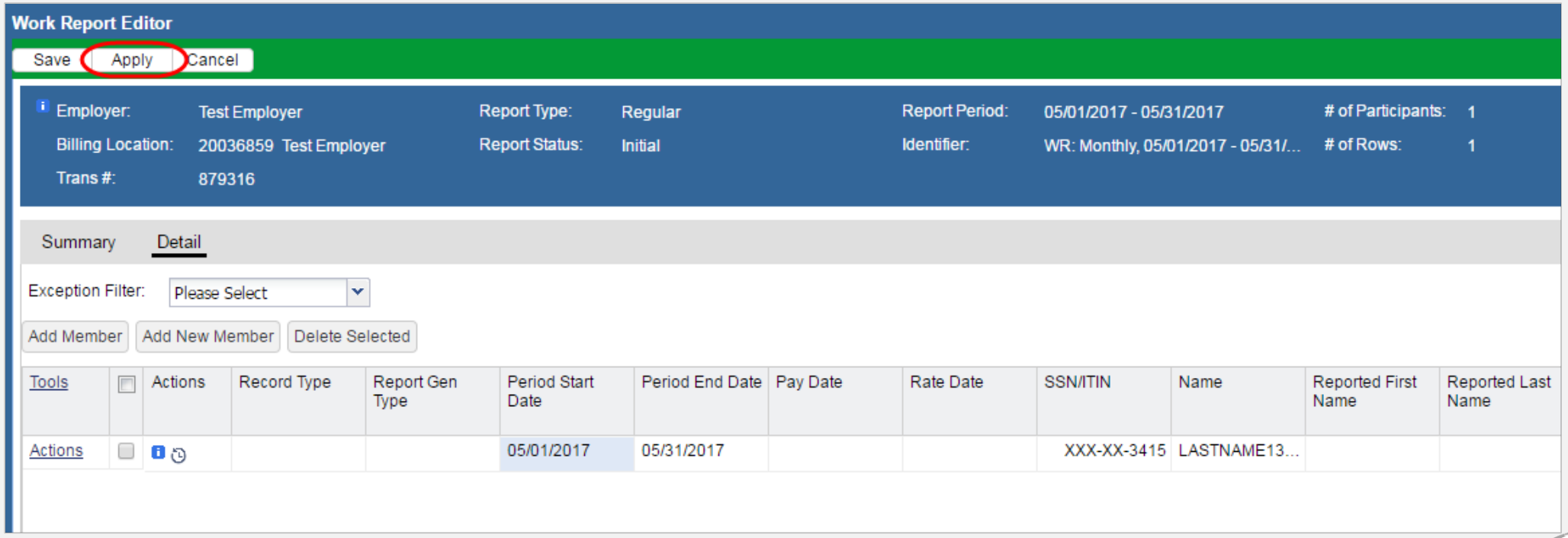
Adding Existing Members

- ✓Selecting the **Add Member** button adds a new row to the work report
- ✓Double click to enter employee's Name into the row



Populating Fields for Members

- ✓Populate the required Work Report fields for each member, including **hours**, **earnings**, and **deductions**
- ✓Click Apply to update the status of each member



Additional Work Report Fields to Update for New Employment Records

- ✓ **Pay Date**
- ✓ **Original Hire**
- ✓ **Begin Date**
- ✓ **Work Status**
- ✓ **WRS Coverage Effective Date**
- ✓ **Employment Status Change**
- ✓ **Employment Status Change Start Date**
- ✓ **Job Category**
- ✓ **Estimated Annual Earnings**
- ✓ **Employer Contribution Date**
- ✓ **Program Code**

Note: See the *myETF Payroll File Resource* document for further information on these fields.

Lesson #4 – New Members

Key Concepts:

1) Who is a new member?
2) Adding a new member to the Work Report
3) How to populate fields in the Work Report
4) Using the View Row tool
5) Reviewing important fields for new members

Who is a New Member?

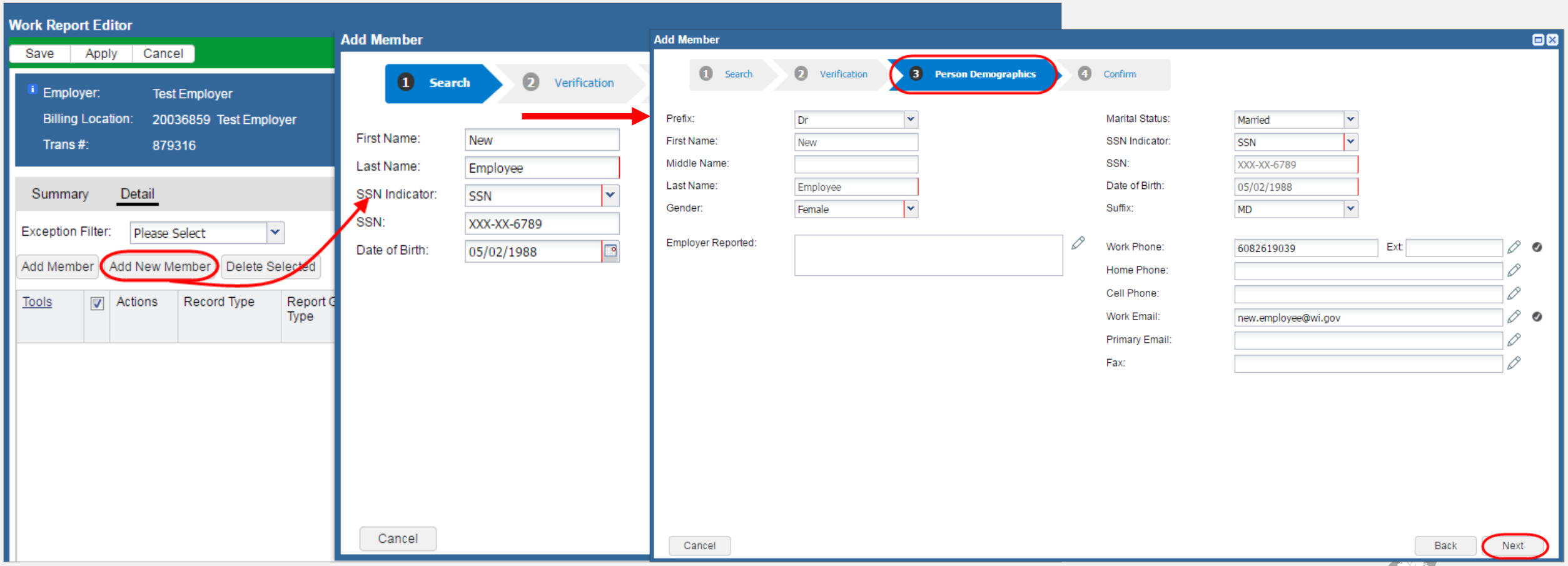
New Members are employees who are not currently listed on your Roster tab, including:

- ✓Employees who began employment since your employee rosters were populated
- ✓WRS Ineligible employees

❖Note: In myETF, you will report all employees who are evaluated for the WRS and receive payment for services rendered, including WRS Ineligible employees

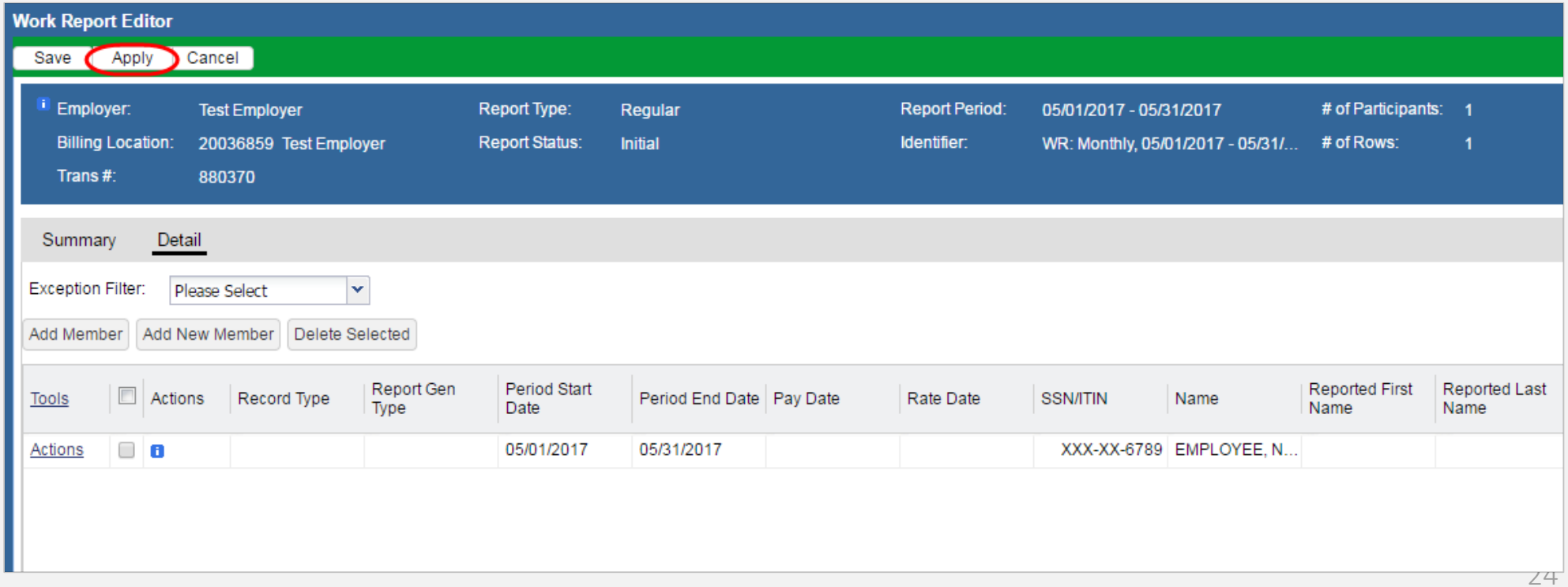
Add New Member Wizard

✓Click the **Add New Member** button to open the **Add New Member Wizard** and add a new member



Populating Fields for New Members

- ✓A row for the member is added to the Work Report
- ✓Populate the required fields for each member, including **hours**, **earnings**, and **deductions**
- ✓Click Apply after you update the fields for each member



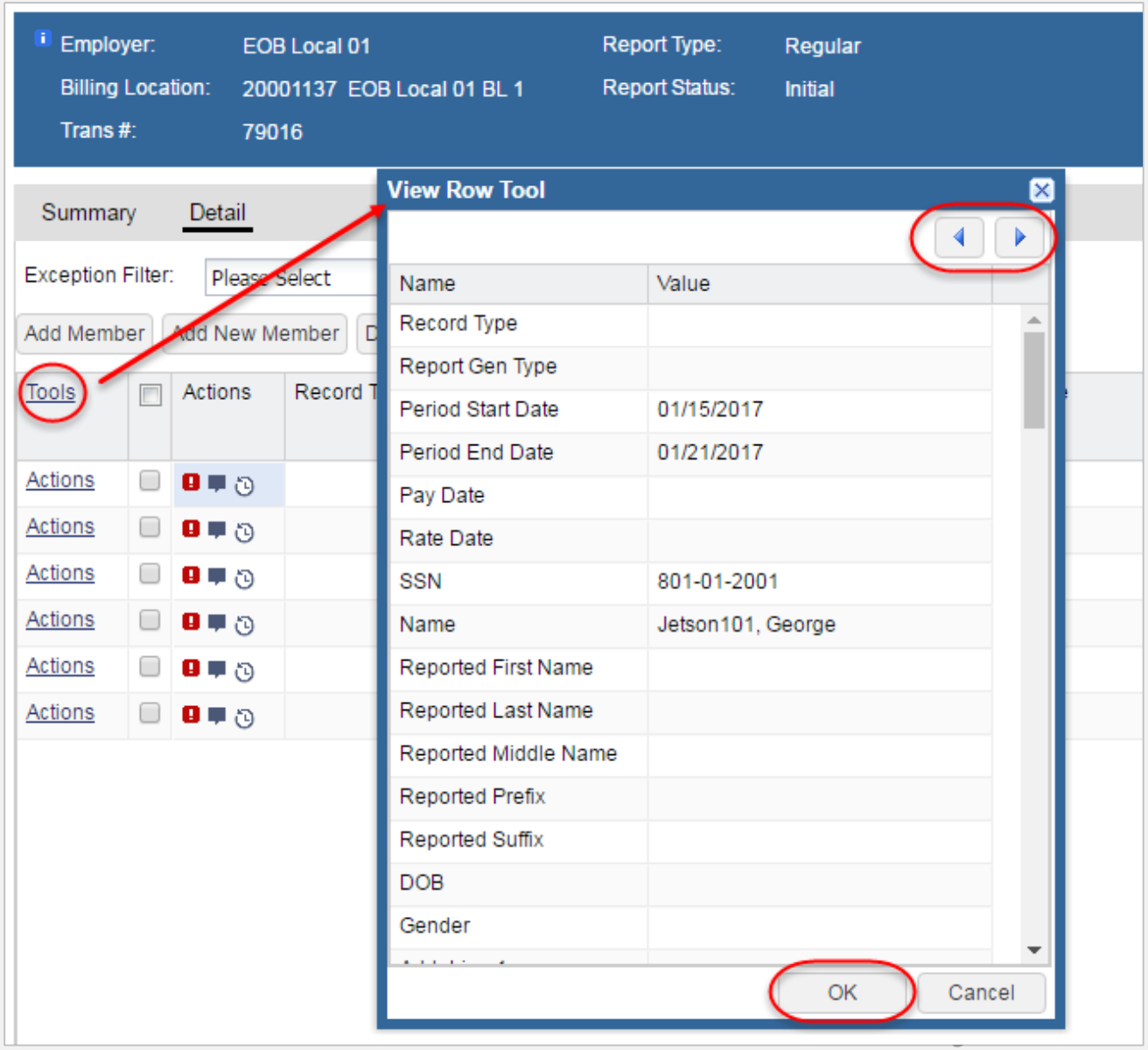
View Row Tool

❖**Note**: Click the **Tools >> View Row** option to review and update rows in the grid pop-up using a vertical scroll format.

✓Use the arrow buttons in the pop-up to move to other rows or member records.

✓Click OK to close the pop-up. The rows in the Detail grid will reflect any changes you completed.

✓Click Apply on the Detail tab to update the status icons for the rows you updated.



Review Important Status Change Fields

View Row Tool

Name	Value
Original Hire Date	05/16/2017
Begin Date	05/16/2017
Work Status	WRS Eligible
WRS Coverage Eff Date	05/16/2017
Empl Status Change	Active Employment
Empl Status Change Sta...	05/16/2017

Lesson #5 – Correcting and Submitting a Work Report

Key Concepts:

1) Reviewing and correcting errors and exceptions
2) Viewing validation messages
3) Submitting the Work Report to ETF

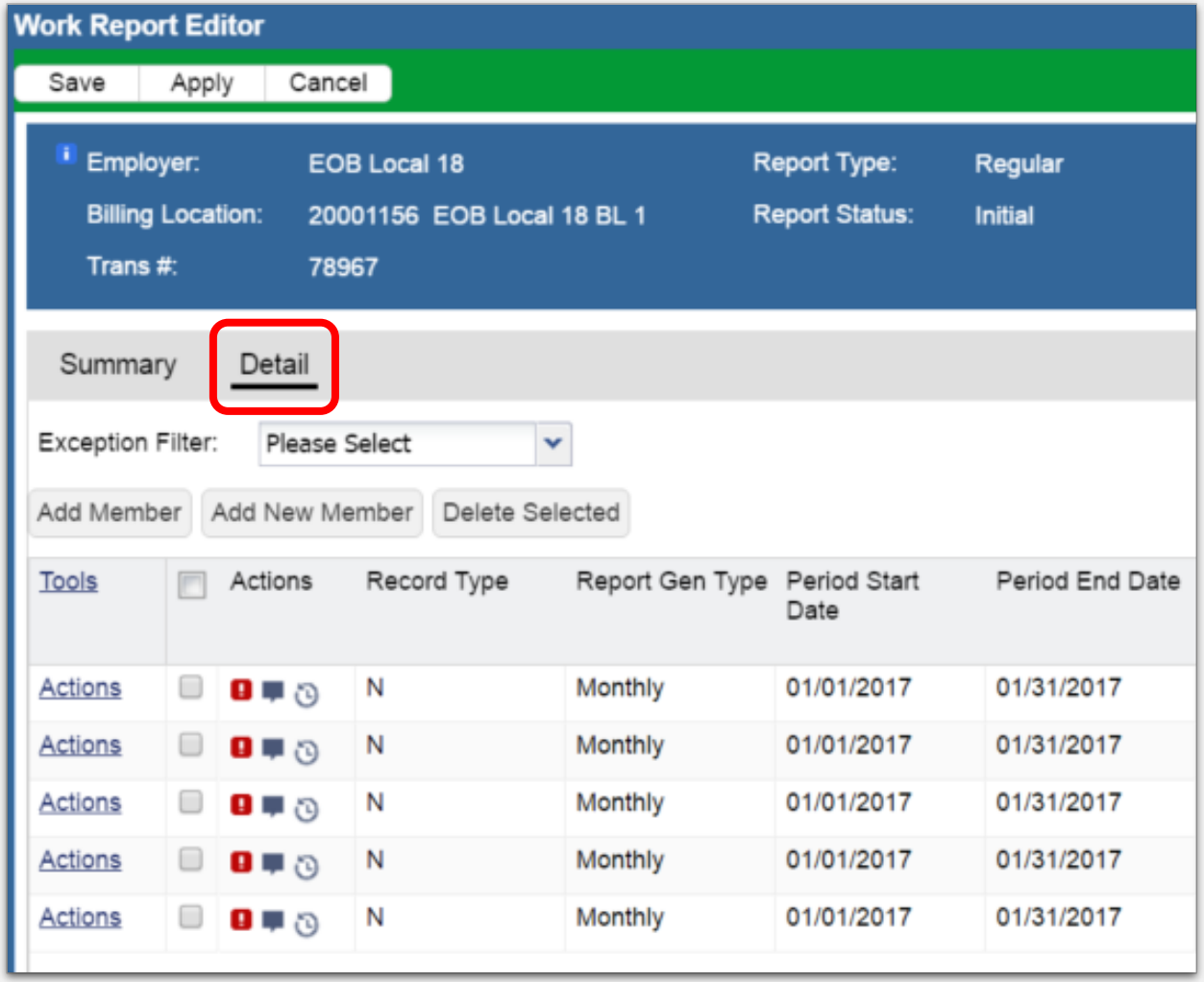
Correcting Errors and Exceptions

❖Note: You will need to review and correct any validation errors and exceptions

✓The Actions column displays the following icons:

- Red indicates “errors”
- Yellow indicates “exceptions”
- Blue indicates “success”

✓Click the Work Report Validation icon for information about each record



Validation Messages

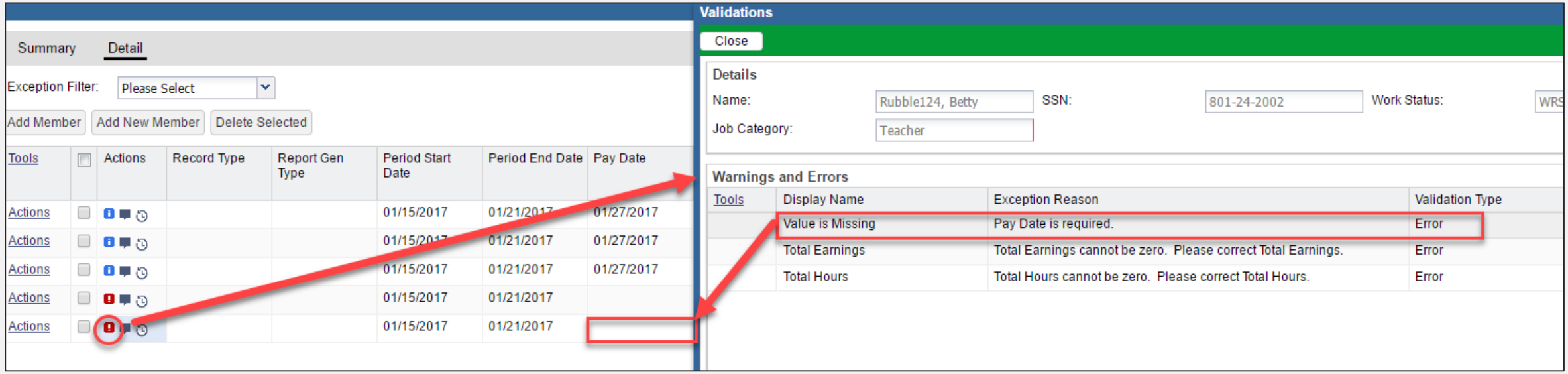
❖**Note**: Errors and exceptions are displayed in the Validation Messages popup

✓All **Errors** must be resolved prior to submitting the Work Report

✓Click **Apply** after making corrections to the Work Report. myETF will automatically update the **Action** icons.

✓Click **Save** to retain all your changes

Validation Messages Example



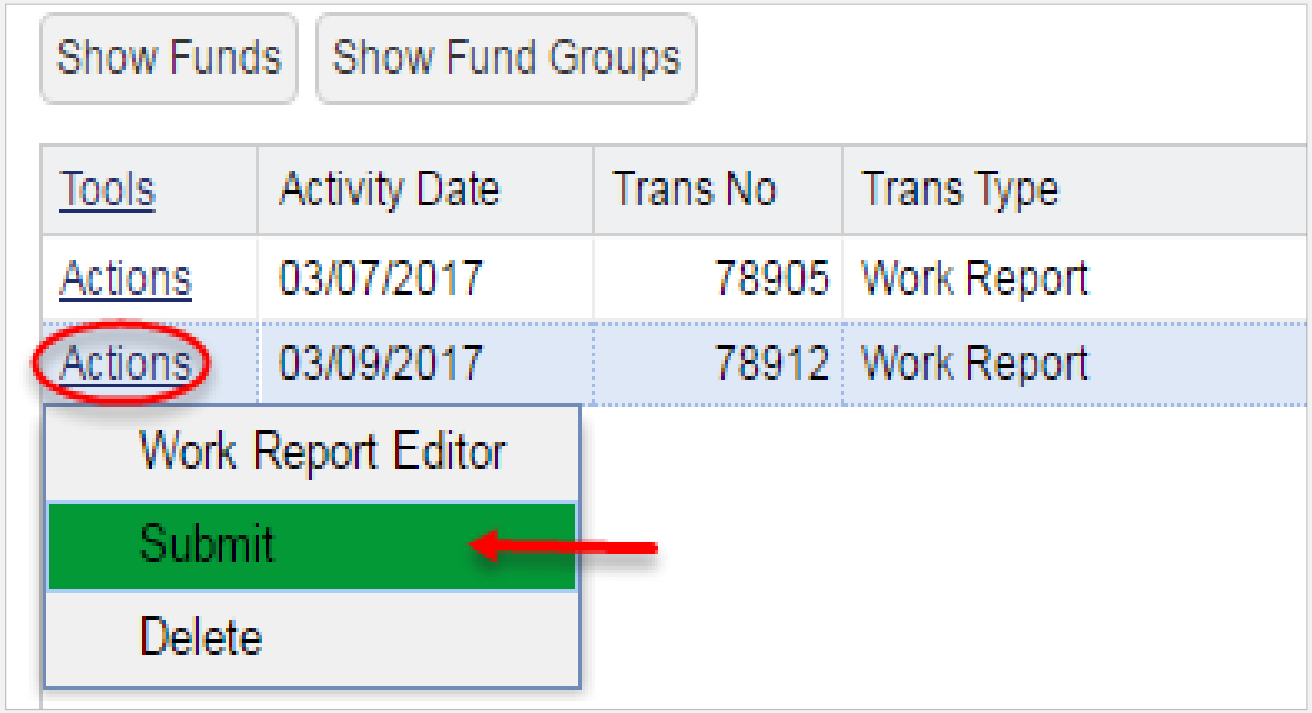
Submitting the Work Report

❖Note: From the **Accounts** tab, you can submit the Work Report

✓Click on **Actions >> Submit** to submit the Work Report to ETF

✓When the **Report Status** says **Posted**, it has been submitted and received at ETF

✓Review the results on the **Roster**

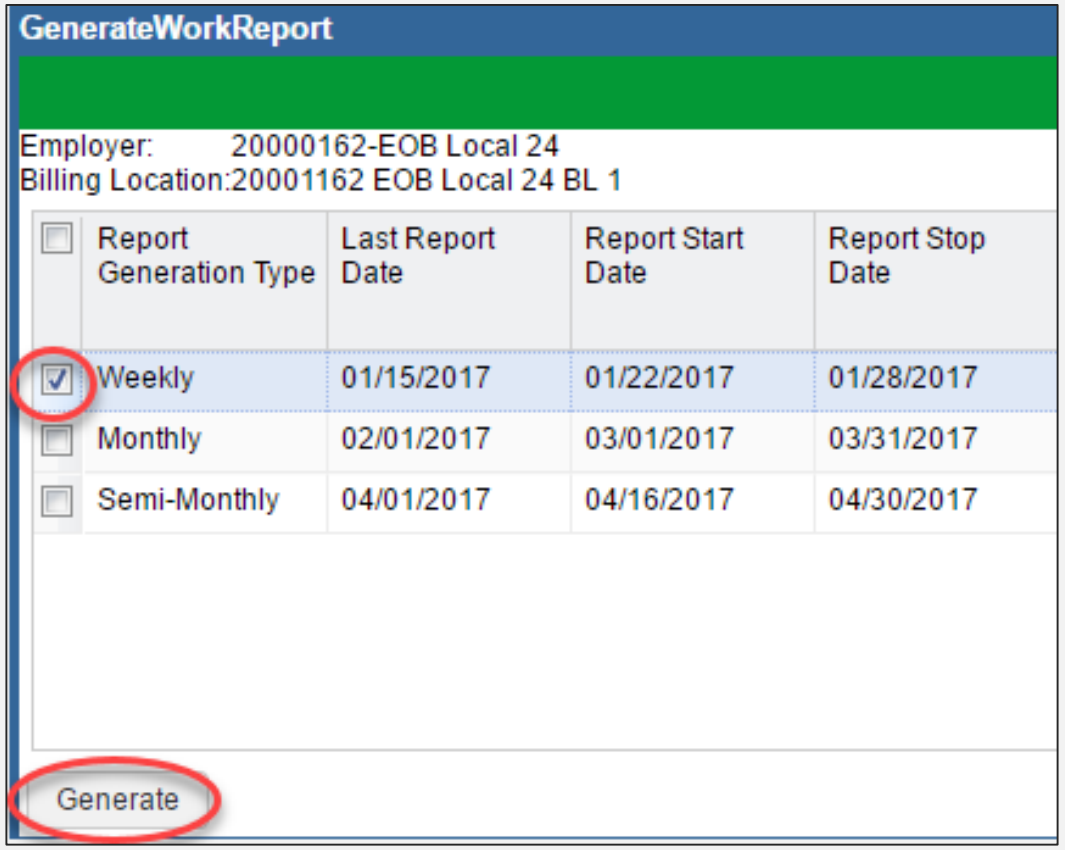


Generating the Next Work Report

From the **Accounts** tab, follow the same process:

- ✓ Click the Manual Report button
- ✓ Select Regular Report
- ✓ Choose the same Report Generation Type
- ✓ Click Generate

The next Work Report in the Reporting Cycle will generate and include all employees from the first one you submitted.



Generating the Next Work Report

- ✓For each of the records with **no Employment Status Changes**, enter the test **Pay Date**, **Hours**, **Earnings**, and **Deductions**.
- ✓Click **Apply** to save updates and continue entering payroll info.

Summary | Detail

Exception Filter: Please Select

Add Member | Add New Member | Delete Selected

Tools		Actions	Record Type	Report Gen Type	Period Start Date	Period End Date	Pay Date	Rate Date	SSN	Name
Actions					01/22/2017	01/28/2017			801-24-2004	Flintson124, Fredrick
Actions					01/22/2017	01/28/2017			801-24-2005	Hound124, Huckleberry
Actions					01/22/2017	01/28/2017			801-24-2001	Jetson124, George
Actions					01/22/2017	01/28/2017			801-24-2002	Rubble124, Betty
Actions					01/22/2017	01/28/2017			801-24-2006	Herculoid, Zandor

Employment Status Changes

Employment Status Changes such as Job Category Changes, Work Status Changes, and Reporting Cycle Changes require **two lines** on the work report.

- ✓ Click the Add Member button
- ✓ Type in the Name (Last, First) and hit tab.
- ✓ Populate the necessary Employment Status Change fields.

Employment Status Changes Job Category Changes Example

- ✓Enrolled in Teacher Job Category – **01/23/2017**
- ✓Terminated from General Employment Job Category – **01/22/2017**

Line 1 = New Employment Record

	Name	Original Hire Date	Begin Date	Work Status	WRS Coverage Eff Date	Empl Status Change	Empl Status Change Start Date	Prev Empl Status Stop Date	Empl Status Change Last Pay Date	DOD	Chapter 40 Term Date	Job Category
1	Flintson124, Fredrick	01/02/2017	01/23/2017	WRS Eligible	01/23/2017	Active Employment	01/23/2017					Teacher
2	Flintson124, Fredrick			WRS Eligible		Termination - Category Change	01/23/2017	01/22/2017	01/22/2017			General Emplo...

Line 2 = Termination of Existing Employment Record

Confirmation Activities

All employers who do not intend to submit Payroll Files must confirm that they can:

1) Generate a test manual work report with **new hires only**

2) Correct and submit the work report

3) Repeat with second payroll cycle

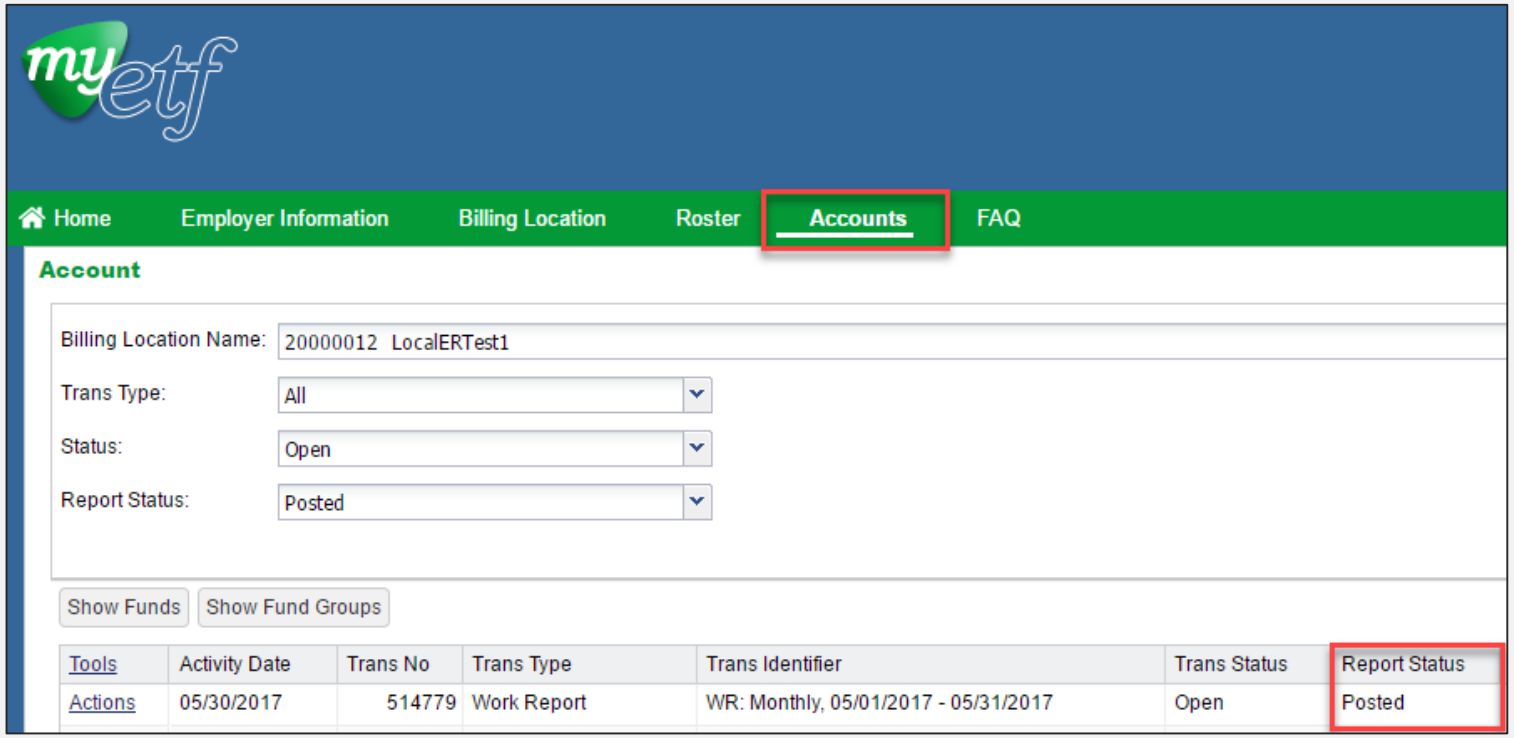
Confirmation Activities

You must then generate a second work report using the same reporting cycle as the first one. Be sure to include:

- ✓ At least one regular, ongoing payroll transaction with no status changes
- ✓ A termination
- ✓ A job category change
- ✓ Other employment status changes as desired.

Confirmation Successful

- When your Work Report displays a Report Status of **Posted** on the **Accounts** tab, you have successfully completed Confirmation.

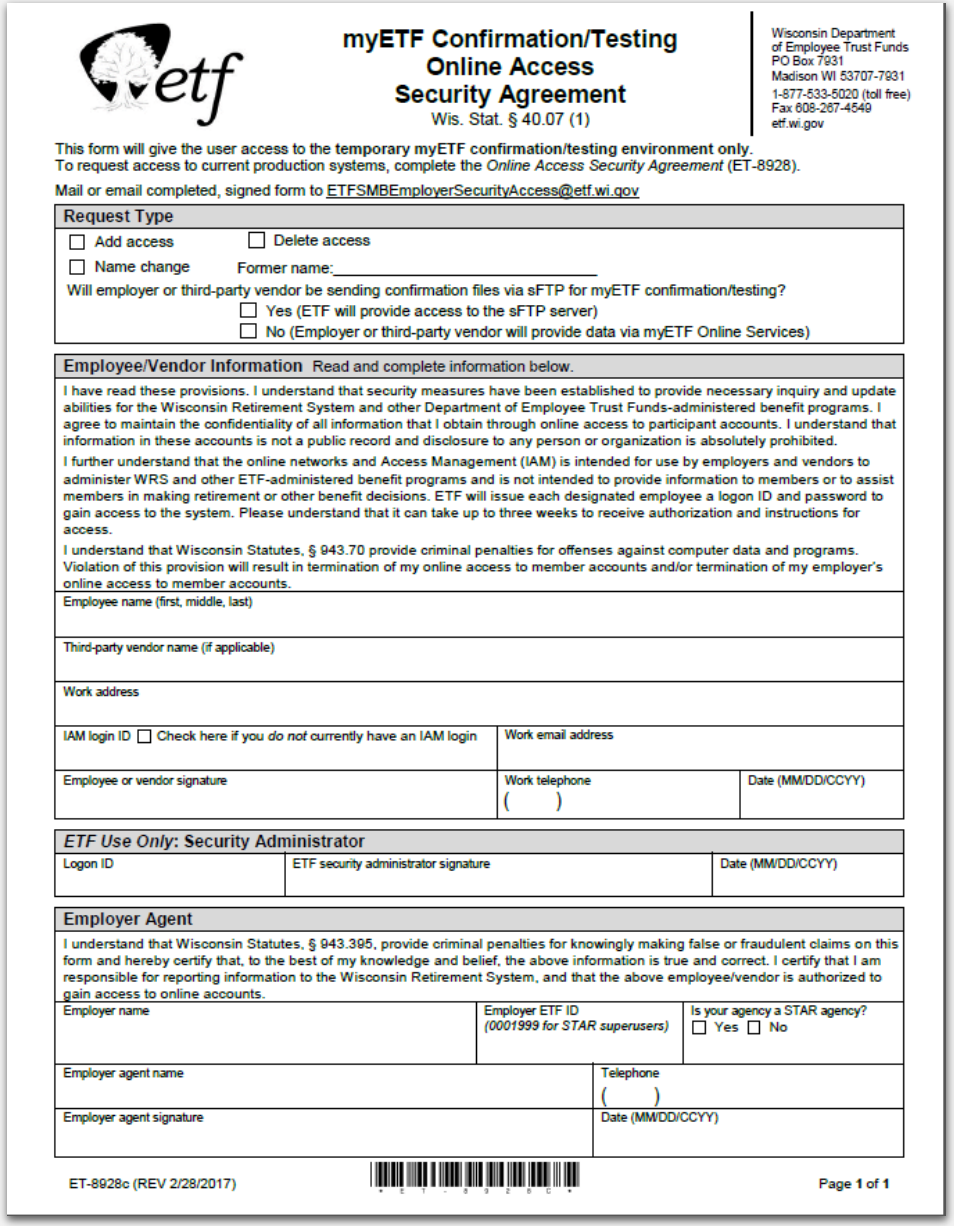


Additional Notes

- Employers are encouraged to submit test work reports with all employee records, or a representative sample of fictitious employee data.
- You should confirm your test work reports by September 15, 2017.

Accessing myETF Employer Online Services for Confirmation

- URL will be distributed to individuals who attend webinars post-training.
- Individual who currently has WRS Account Update access will automatically be given access.
- If employer determines another individual should complete confirmation requirements, the Employer Agent must authorize by sending in **myETF Confirmation/Testing Online Access Security Agreement.**



myETF Confirmation/Testing Online Access Security Agreement
Wis. Stat. § 40.07 (1)

Wisconsin Department of Employee Trust Funds
PO Box 7931
Madison WI 53707-7931
1-877-533-5020 (toll free)
Fax 608-267-4549
etf.wi.gov

This form will give the user access to the **temporary myETF confirmation/testing environment only**.
To request access to current production systems, complete the *Online Access Security Agreement* (ET-8928).

Mail or email completed, signed form to ETFSMBEmployerSecurityAccess@etf.wi.gov

Request Type

☐ Add access ☐ Delete access
☐ Name change Former name:_____
Will employer or third-party vendor be sending confirmation files via sFTP for myETF confirmation/testing?
☐ Yes (ETF will provide access to the sFTP server)
☐ No (Employer or third-party vendor will provide data via myETF Online Services)

Employee/Vendor Information Read and complete information below.

I have read these provisions. I understand that security measures have been established to provide necessary inquiry and update abilities for the Wisconsin Retirement System and other Department of Employee Trust Funds-administered benefit programs. I agree to maintain the confidentiality of all information that I obtain through online access to participant accounts. I understand that information in these accounts is not a public record and disclosure to any person or organization is absolutely prohibited.

I further understand that the online networks and Access Management (IAM) is intended for use by employers and vendors to administer WRS and other ETF-administered benefit programs and is not intended to provide information to members or to assist members in making retirement or other benefit decisions. ETF will issue each designated employee a logon ID and password to gain access to the system. Please understand that it can take up to three weeks to receive authorization and instructions for access.

I understand that Wisconsin Statutes, § 943.70 provide criminal penalties for offenses against computer data and programs. Violation of this provision will result in termination of my online access to member accounts and/or termination of my employer's online access to member accounts.

Employee name (first, middle, last)		
Third-party vendor name (if applicable)		
Work address		
IAM login ID ☐ Check here if you *do not* currently have an IAM login	Work email address	
Employee or vendor signature	Work telephone ( )	Date (MM/DD/CCYY)

***ETF Use Only*: Security Administrator**

Logon ID	ETF security administrator signature	Date (MM/DD/CCYY)

Employer Agent

I understand that Wisconsin Statutes, § 943.395, provide criminal penalties for knowingly making false or fraudulent claims on this form and hereby certify that, to the best of my knowledge and belief, the above information is true and correct. I certify that I am responsible for reporting information to the Wisconsin Retirement System, and that the above employee/vendor is authorized to gain access to online accounts.

Employer name	Employer ETF ID *(0001999 for STAR superusers)*	Is your agency a STAR agency? ☐ Yes ☐ No
Employer agent name	Telephone ( )	
Employer agent signature	Date (MM/DD/CCYY)	

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myETF Maintenance

Note: myETF will be unavailable on the following dates, between 5:00 p.m. and 8:00 a.m. CT. All dates are Wednesdays. We apologize in advance for any inconvenience.

May 31	August 9, 23
June 14, 28	September 6, 20
July 12, 26	October 4, 18

myETF Employer Online Services Upcoming Trainings

✓ **myETF Income Continuation Insurance (ICI) Set-Up Webinar**

Summer 2017

- Target: All employers who offer ICI

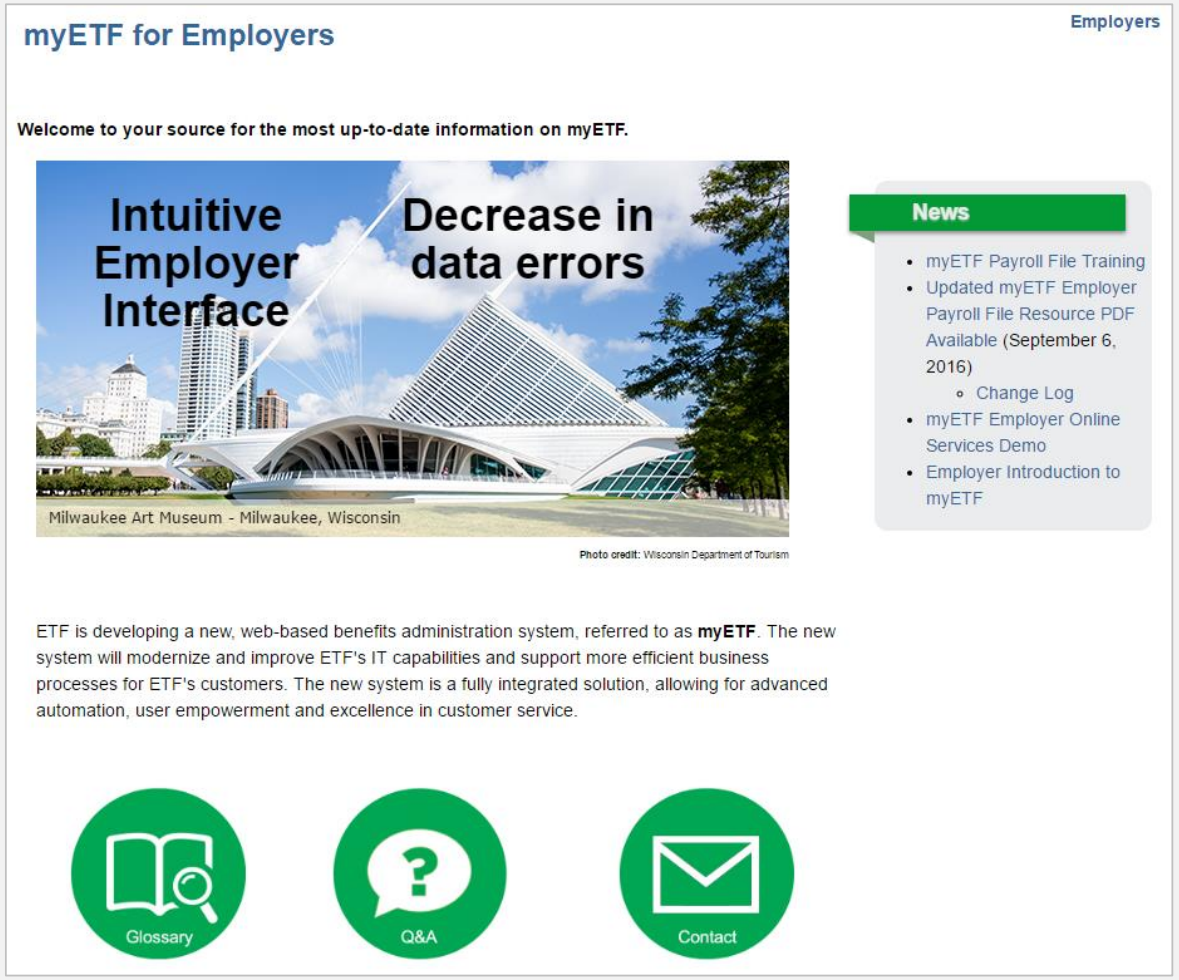
✓ **myETF Employer Online Services Full Training**

Late Summer 2017 to Fall 2017

- Target: All employers

Help Resources

- IAM End User Guide
- myETF for Employers The main source for myETF news and resources
  - **myETF Employer Reporting Confirmation User Guide**
  - **myETF Video demonstrations**
  - **myETF Confirmation Instructions**
  - **myETF Payroll File Resource**
  - **myETF Employment File Resource**



Help Resources

myETFEmployers@etf.wi.gov

A special mailbox for employer questions about myETF

Employer Communication Center (Toll-Free)

(877) 533-5020 opt 2

Stay Connected

etf_wi

etf.wi.gov

ETF E-mail Updates

608-266-3285
1-877-533-5020

etf