

myETF Employer Readiness

Joint Meeting

Employee Trust Funds Board, Teachers Retirement Board

Wisconsin Retirement Board

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Agenda

- Why myETF is Needed
- Benefits to Employers
- Employer Onboarding
- Employer Feedback



Single, fully integrated benefit administration system (BAS)

Why is it needed?

- ETF has 20 aging home-grown computer systems
 - Difficult and costly to maintain
- Most processes are paper-centric
- Can't keep up with growing service demands
- Losing institutional knowledge on legacy systems and processes

Rollouts

Rollout 1 Nov. 2015



Rollout 2 Jan. 2018



Rollout 3 2020



Members
Portal expected in
summer 2018
Major functionality
in R3



Employers
Major functionality
in R2

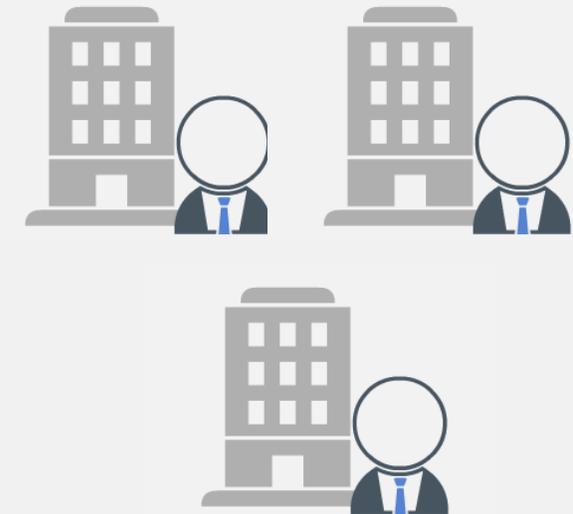
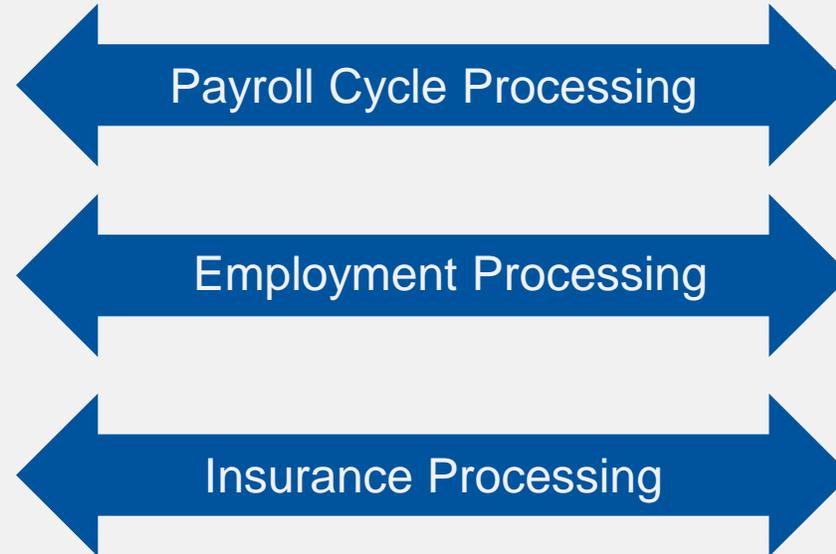


Third Party
Administrators

Benefits to Employers

- Intuitive Employer Interface
- Payroll Based Reporting Cycles
- Elimination of Annual Reconciliation
- Limited Paper Processes
- Secure Electronic Communications
- Single Source of Information
- Improved Data Quality
- myETF Tracks all Health, Life and Income Continuation Insurance (ICI) enrollments, changes and premium payments
- Most Processing is Done Real-Time

Employer Onboarding: What Changes for Employers?



Employer Onboarding: Key Players



**ETF Employer
Services**



myETF Project Teams
(workgroups consisting
of 20+ sub-teams)

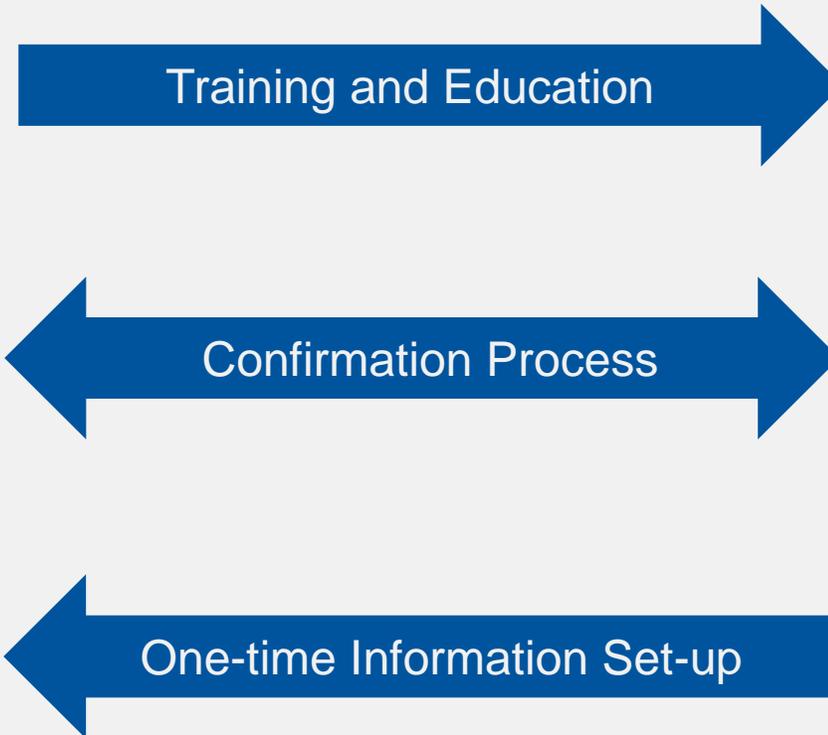


**Employers and
Employer Advisory
Teams**

Employer Onboarding: Employer Services

- Main point of contact between ETF and employers
- First line of support
- Early training
 - Payroll
 - Employment
 - Insurance
 - Production Setup

Employer Onboarding: Prerequisites for Employers



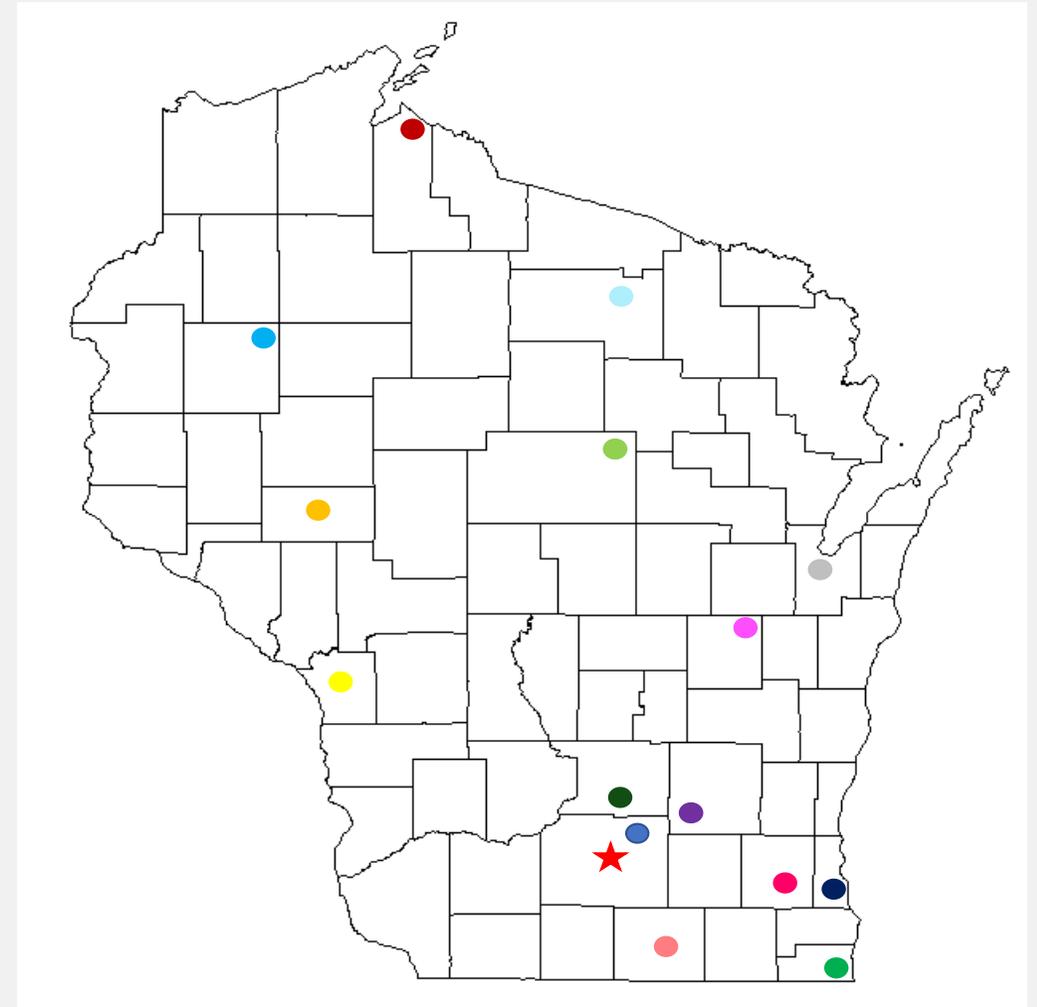
Employer Training

- In-person training at more than a dozen locations
- More than 30 sessions offered for in-person training
- Webinar-based training “events”
- Recorded training sessions
- Dedicated call center staff taking calls/questions
- All ESS (Employer Support Services) staff trained for support

myETF Roadshow

Employer In-person Training

- Assorted locations
- August – December



What Employers/Customers are Saying

- “Thank you for starting early on this transition and keeping to the original time line. It's a mess when organizations are not ready for their new systems. Things seem to be moving along nicely which make it easier on us in the end.” – School District
- “I work with a little over 30 states on requirements for retirement and you have taken the lead with your approach of including employers and vendors in the steps toward go-live. I am impressed with your presentation of the material and with the web portal. The grid functionality is a nice feature.” – Payroll Vendor

What Employers/Customers are Saying

- “The interaction was very helpful. Thank you for the quick direct answers to questions. Keep doing them like this. Perfect! Looking forward to future webinars.”
- “I was so excited to hear all the changes, and they are all for the better! Thanks!”
- “No more annual reconciliation, woo hoo!!!!”
- “Yayyyy no annual report reconciliation!!!”
- “What took ETF so long?”
- “I'm extremely happy the annual reconciliation is going away. It is confusing, difficult to do and very time consuming.”

myETF Messenger

myETF Messenger
myETF news for employers

June 27, 2017

117 days until go live

- [Stay up to Date With myETF](#)
- [Should I Use myETF File Upload or Submit Manual Work Reports?](#)
- [Make Employer Profile Updates Easier](#)
- [myETF Web Tools: Income, Contributions, ROLANER](#)
- [Q&A: Get Answers to Your Most Asked myETF Questions](#)

myETF Employer Web Pages

The [myETF Employer web pages](#) are the main source of information about the new benefits administration system, myETF. Take a look to find downloadable resources, training schedules and registration, frequently asked questions and more related to myETF.

Upcoming Training

[myETF K1 Setup File Training](#)

July 11, 2017 11:00 a.m. - 12:00 p.m. CDT

[myETF Employer Reporting Confirmation Training](#)

File Upload and Manual Entry webinars available. View the recorded session or sign up for a live webinar now.

[myETF Employment File Resource Training](#)

View the 60-minute recorded webinar on demand.

[myETF Payroll File Resource Training](#)

View the 60-minute recorded webinar on demand.

Stay up to Date With myETF

Welcome to myETF Messenger, your consolidated source for myETF news. As we approach the release of myETF on January 1, 2018, we will continue working closely with employers in preparation for the transition. To reduce the number of emails ETF sends to employers, we will communicate all of the less time-sensitive news through one source: myETF Messenger.

We plan on sending myETF Messenger to all employers and payroll vendors on the last Tuesday of every month. You'll also be able to find past editions of this newsletter on the [myETF Employer web pages](#) as we release them.

Should I Use myETF File Upload or Submit Manual Work Reports?

It's the employer's decision whether to submit your payroll information through myETF File Upload or to generate a work report manually in myETF. You will want to consider your organization's technical ability, the number of employees and personal preference as you decide.

As a guideline, the employer Payroll File upload process is typically beneficial for employers who have 50 or more employees. Uploading a Payroll File automatically creates a work report for the payroll based on the established reporting cycles. You can submit your Payroll File in either the [Comma Separated Value \(CSV\)](#) format or the [Extensible Markup Language \(XML\)](#) format. All employers will have the ability to import Payroll Files; however, smaller employers may choose instead to generate a work report manually.

Smaller employers (typically with 50 or fewer employees) can generate a manual work report directly in myETF Employer Online Services. Generally, it takes about 15 minutes to manually enter data for 10 employees. To better assist employers who choose the manual entry method, myETF will pre-populate the work report with all member and employment information from the previously released report. Employers who plan to do manual entry also need to understand the field values found in the [myETF Payroll File Resource document](#). We have live and recorded versions of training/webinars for both the file upload and the manual work report processes.

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myETF for Employers

Employers

Welcome to your source for the most up-to-date information on myETF.



Photo credit: Wisconsin Department of Tourism



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- News
- myETF System Maintenance Calendar
 - myETF Employer Payroll Setup File Resource (May 23, 2017)
 - myETF Employer ICI Enrollment Setup File







Questions?

Thank you



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ETF E-mail Updates



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