Employer Transaction Application (ETA) Guide

For UWs

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Objectives

This guide will help you navigate the Employer Transaction Application (ETA). The UW will have access to the Employer Transaction Application (ETA) user interface to update employee demographic and eligibility information, new employee enrollments, and employee terminations. We understand most of the updates will be coming to ETF through a file each Thursday. Specifically, UW will need to complete the updates to SSNs, changes to hire dates and date of births within the ETA user interface.

> NOTE: UW will be sending most employee transactions via ETA File. The information from the file will be processed, pass initial validations, and will be displayed in the ETA UI as 'EODReady' or 'Rejected' status within an hour. You will be able to make edits to these transactions until the transactions are processed overnight. ETA UI will only display same-day transactions unless the transaction is in 'Rejected' status. Transactions in 'Rejected' status will remain until the error is corrected to be reprocessed or the transaction is deleted.

Getting Started

UW provided a list of users who will be HR Administrators on behalf of UW (users completed the Online Access Security Agreement (IAS) (ET-8928i) for access). These users can add new employees or update existing employee data in the ETA. Common transactions include entering new hires or employment terminations, changes in job status, demographic changes (SSN update, DOB update, Hire Date update, address changes, name changes, etc.), annual salary updates for life and income continuation (ICI) coverage, and other employment updates that impact insurance enrollment and eligibility.

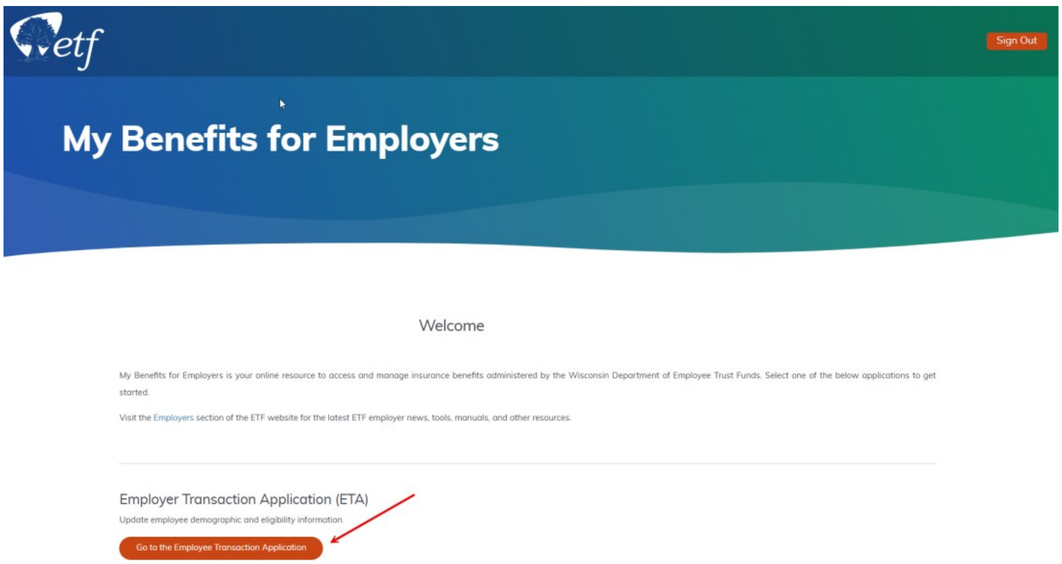
- Refer to the **Key – ETA UI (UW)** on page 15 for specific field information.
- Information is shared with My Insurance Benefits, the online platform where employees will manage their benefits.
- Upon request to ETF, a list of users who keyed a transaction can be provided.

> **Note**: There is currently no way to view details for all employees in a single list or process mass employment updates. At this time, you need to view and/or update employees individually.

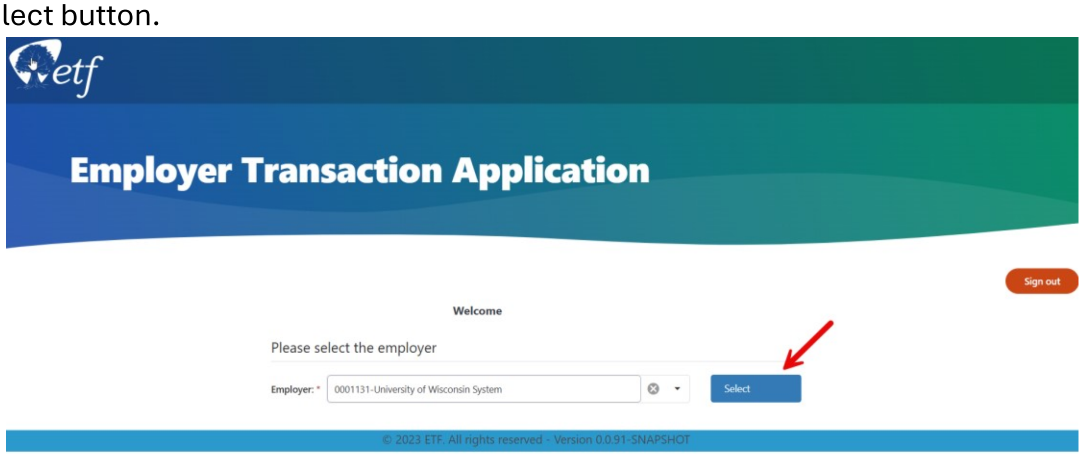
Accessing ETA

To access the ETA application – please follow the below steps:

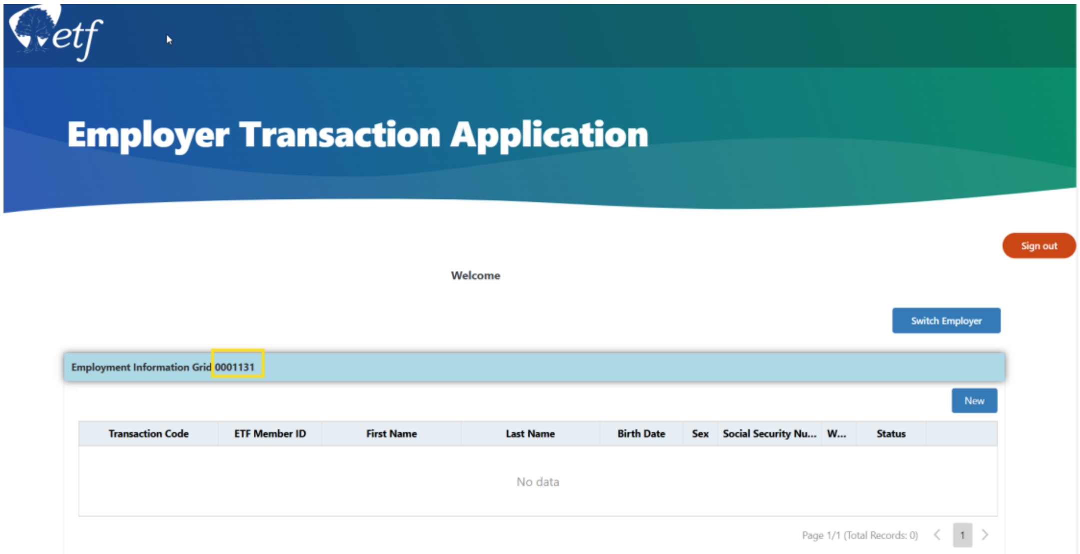
1. Copy and paste this URL to your preferred web browser, such as Chrome/Edge: [Employer Portal]
2. Once in the Employer Portal, you will see the Employer Transaction Application (ETA). Click on the link.



3. Once you are in the ETA, you will see a welcome message with your name. The application will prompt you to select the desired employer from a drop-down. UW would be the only employer listed in the dropdown for you to select. Then click the Select button.



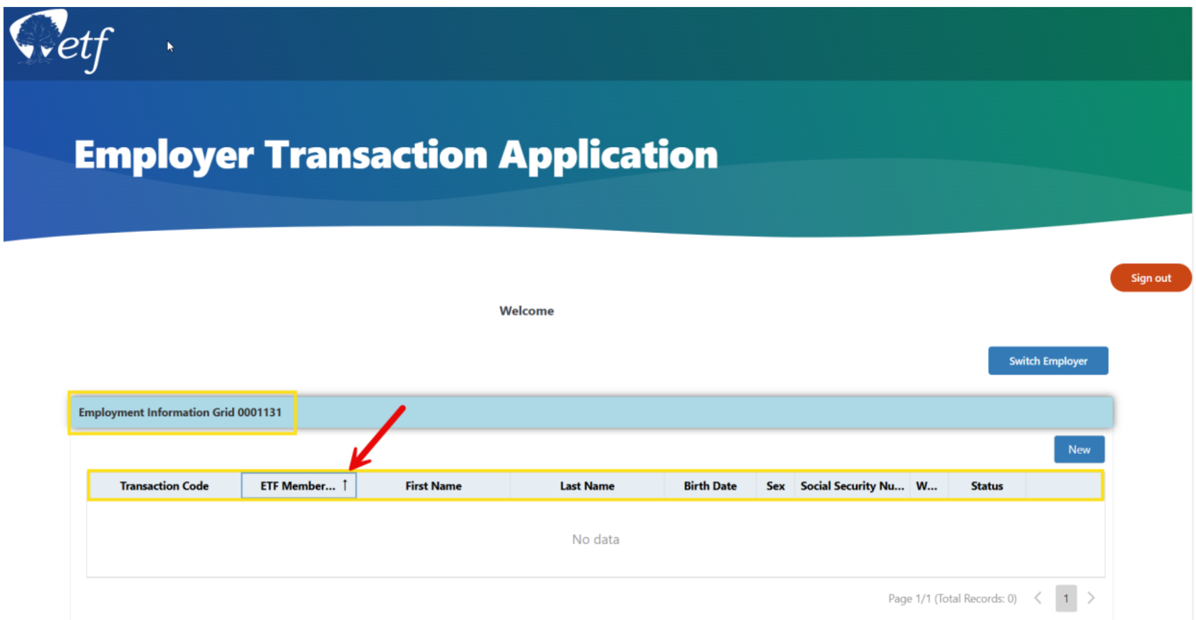
4. You will then be taken into the ETA application.



Employment Information Grid

The main screen of the ETA application displays the Employment Information Grid. The Employment Information Grid only displays transactions for an employee that was entered the same day or if a transaction previously submitted had been rejected.

You can sort employees within the grid by clicking on the different bolded headings (ETF Member ID, First Name, Last Name, etc.).

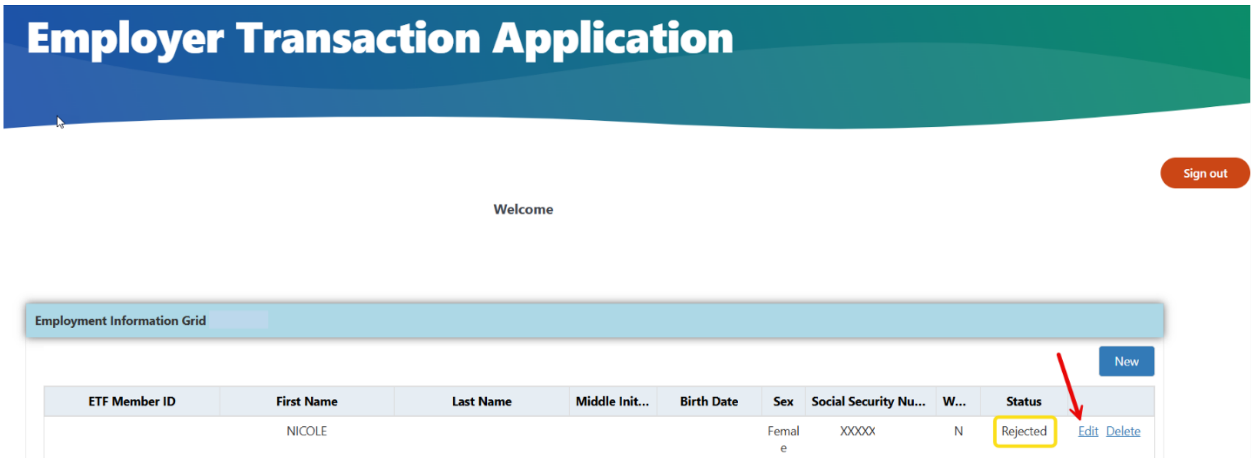


There are two (2) different status values that may appear on the grid:

- **Rejected** – employee transaction has errors that must be corrected before processing. Rejected transactions will remain on the grid unless:
  - a later transaction for the same employee was processed successfully
  - the employer 'Edit' the transaction to correct the error(s) and the transaction status turns to 'EODReady'
  - the employer 'Delete' the rejected transaction
- **EODReady** – employee transaction has been submitted same day and will process overnight

Selecting the "Edit" button from the 'Employment Information Grid' will allow you to view that employee's transaction and update their information.

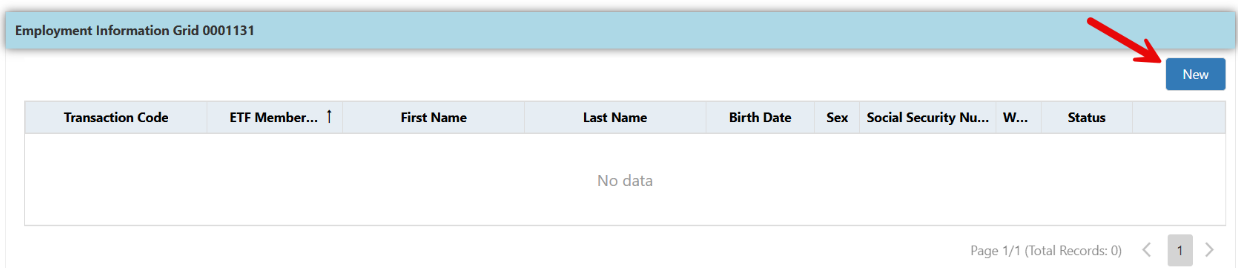
- ‘Rejected’ status transactions must use the ‘Edit’ button to view error message(s) to make corrections before the transaction will have a status change to ‘EODReady’ and process overnight.



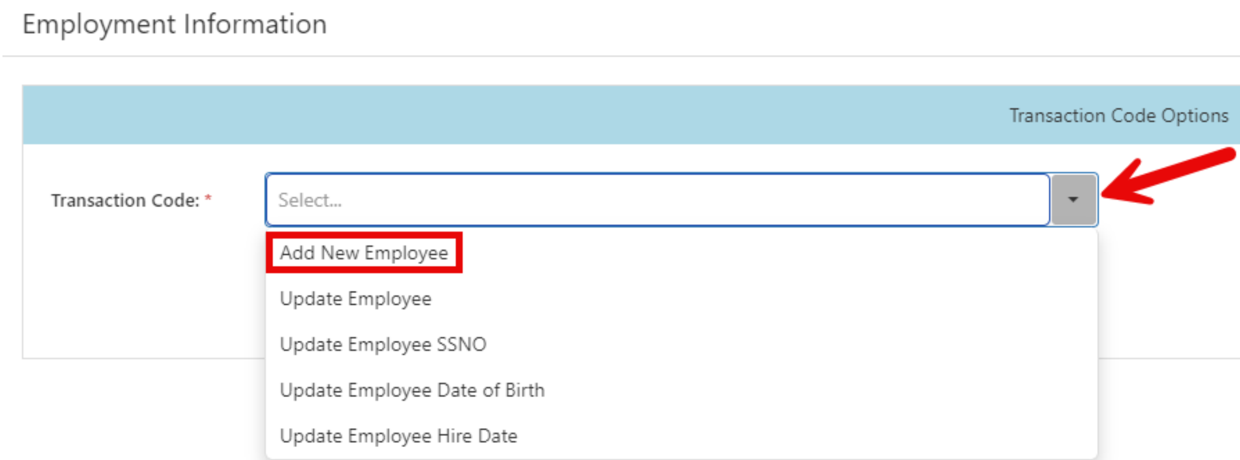
Adding a New Employee

To add a new employee, follow the steps below:

1. Click the “New” button. An Employment Information pop up box with transaction code options will appear.

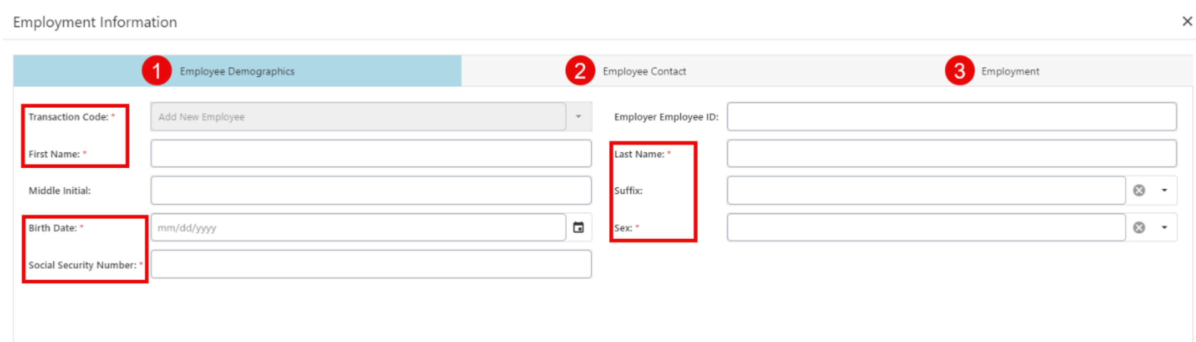


2. The grey arrow next to the box will cascade options for you to choose. Click on the down arrow and Select “Add New Employee”.



3. Enter the required fields marked with a red asterisk (*) on each of the tabs shown above in the *Employment Information* page – specifically, the Employee Demographics (1), Employee Contact (2), and Employment tabs (3). These fields are required for **ALL** employees.

    - See below image for each tab numbered 1, 2, and 3. The red asterisk (*) fields are called out with a red box.

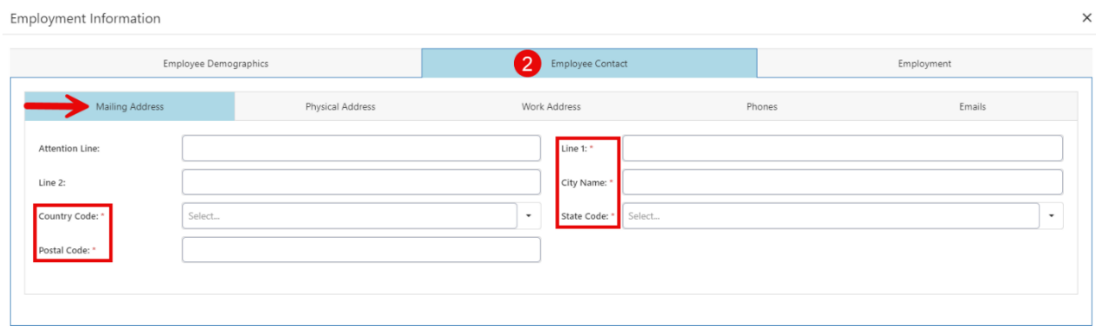


Some fields, such as the "Sex" field, have pre-determined values from which you can choose. Click on the drop-down arrows to open a list of valid values for each field.

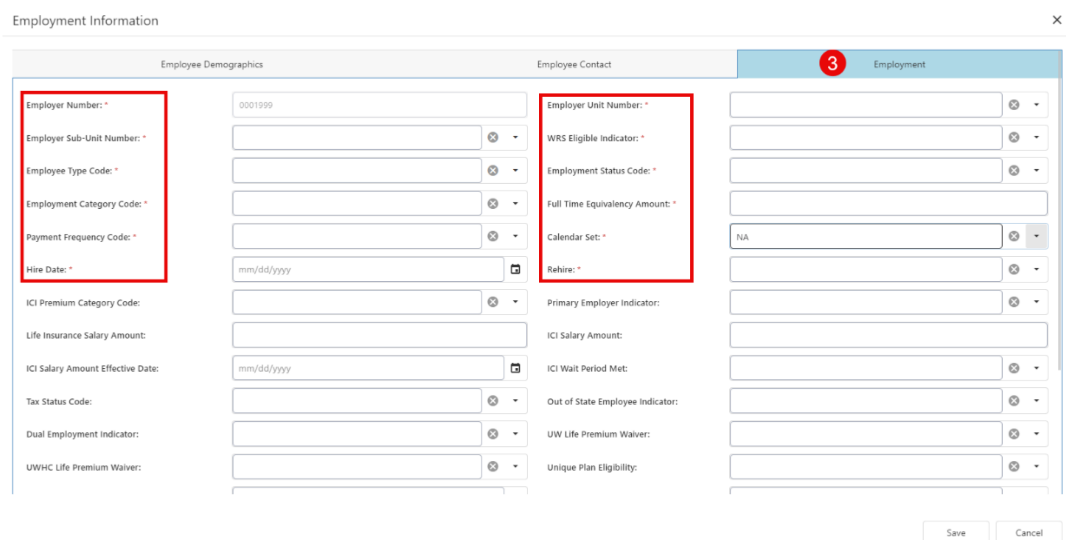
Some fields are only required for employers that offer certain benefits. Since UW offers the benefits listed, these fields must be completed. These "conditionally required" fields are not marked with a red asterisk, but they are still required for employers who offer those benefits.

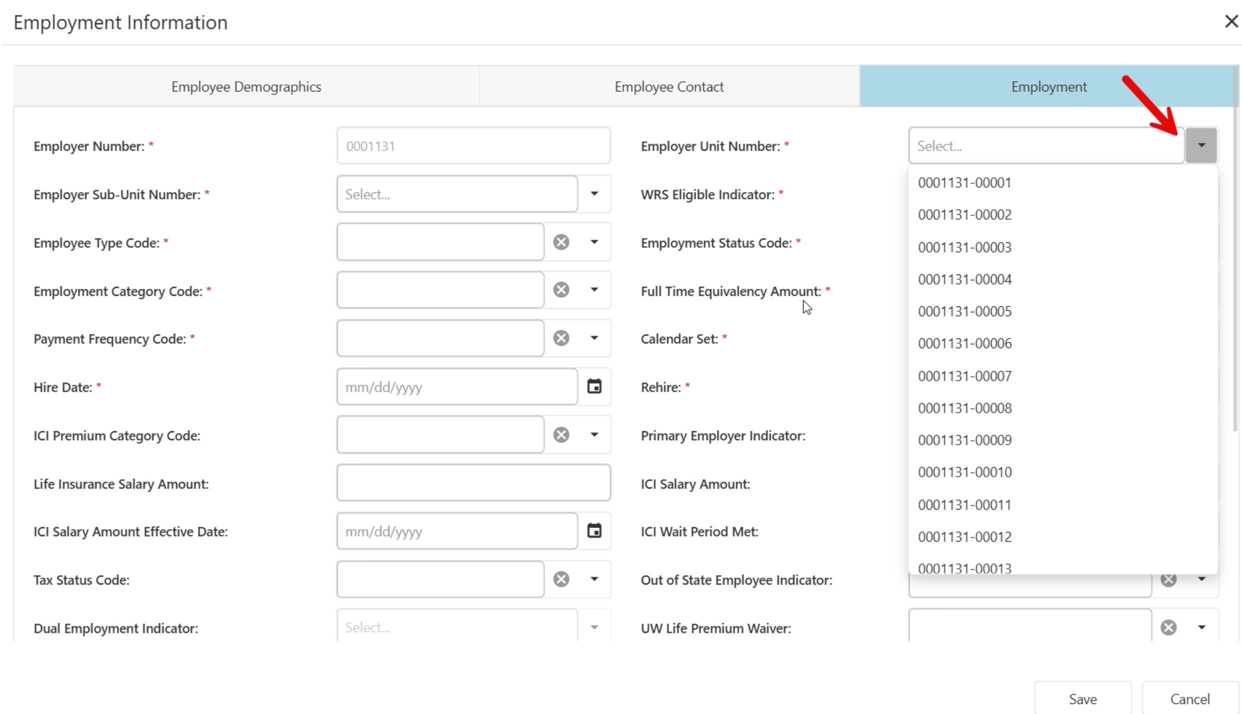
Any errors or missing data in required or conditionally required fields will result in an error message. Correct the information indicated by the error message.

4. Enter contact information on the Employee Contact tab (labeled 2 in the below image). Only the mailing address is required (as indicated by the red asterisks (*) and red boxes in the below image), but additional contact details, such as phone and email, can also be added.



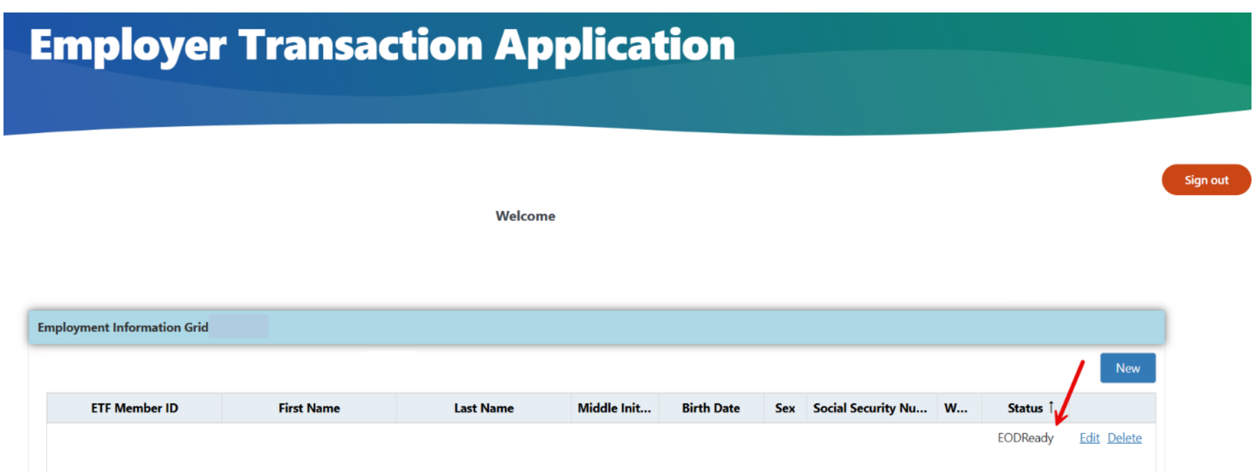
5. On the Employment tab (3 below), fill in the employment details. Your employer number will be pre-filled based on your login. Fields marked with a red asterisk (*) are required and called out in a red box below. Once the Employer Unit Number is selected, the Employer Sub-Unit Number will auto-fill.





6. Once you have completed entering employee data, click Save at the bottom right-hand corner of the Employment Information box.

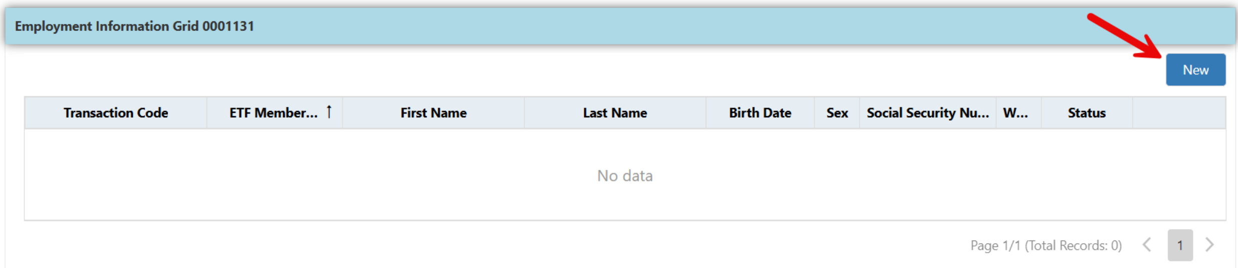
7. After saving your entry, you can then view the employee record in the table on the Employment Information Grid for your employer. The transaction will have an 'EODReady' status. You will have until the end of the day to 'Edit' the 'EODReady' transaction to update/correct any information before the transaction is processed overnight.



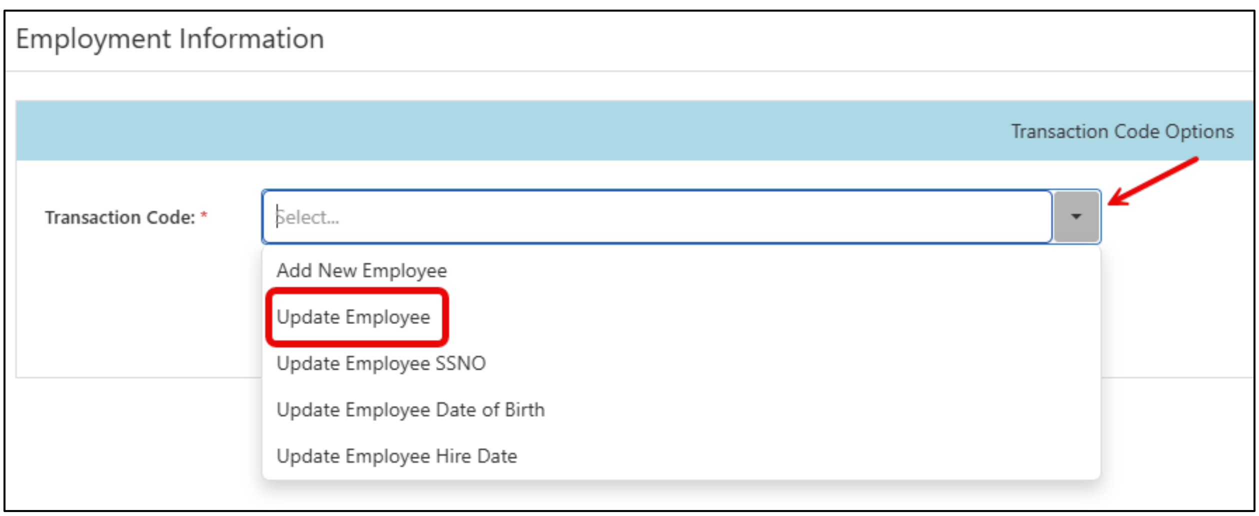
Updating an Employee

To update an employee record follow the steps below:

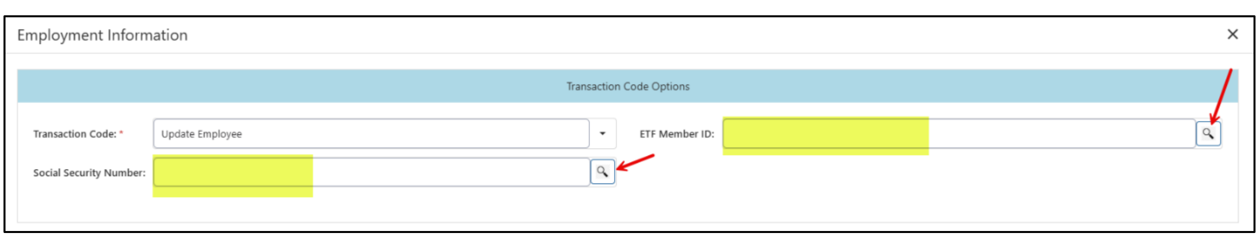
1. Click the “New” button. An Employment Information pop up box with transaction code options will appear.



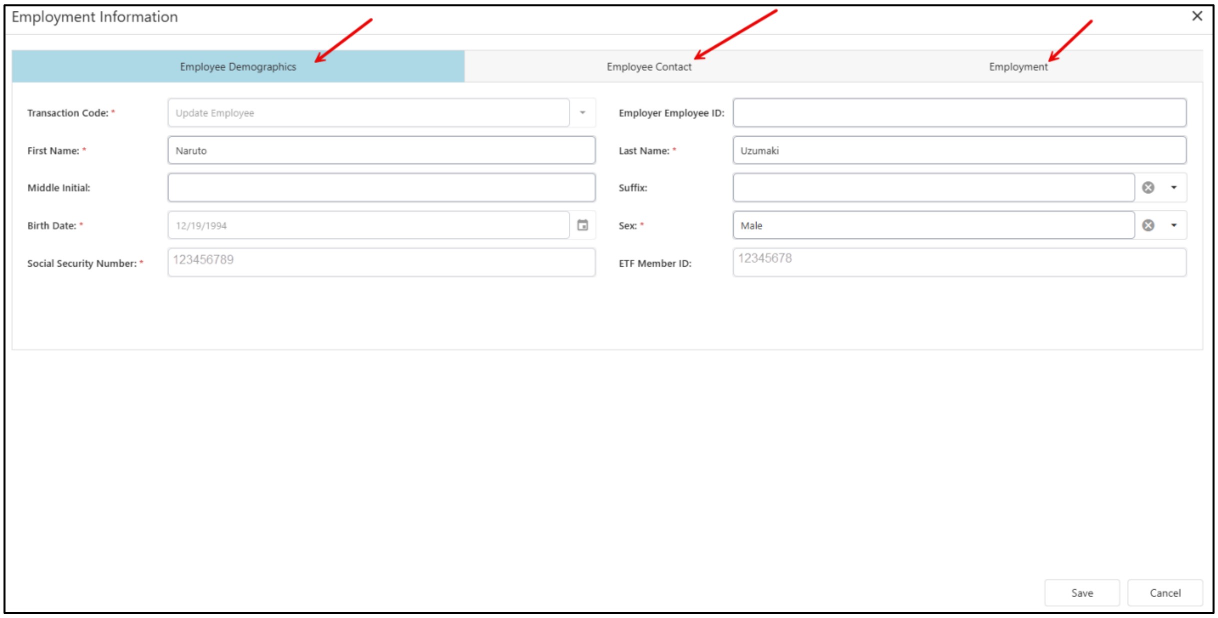
2. The grey arrow next to the box will cascade options for you to choose. Click on the down arrow and Select “Update Employee”.
   NOTE: To update/change a SSN, DOB, and/or Employee Hire Date, the specific transaction code must be chosen from the drop-down box.



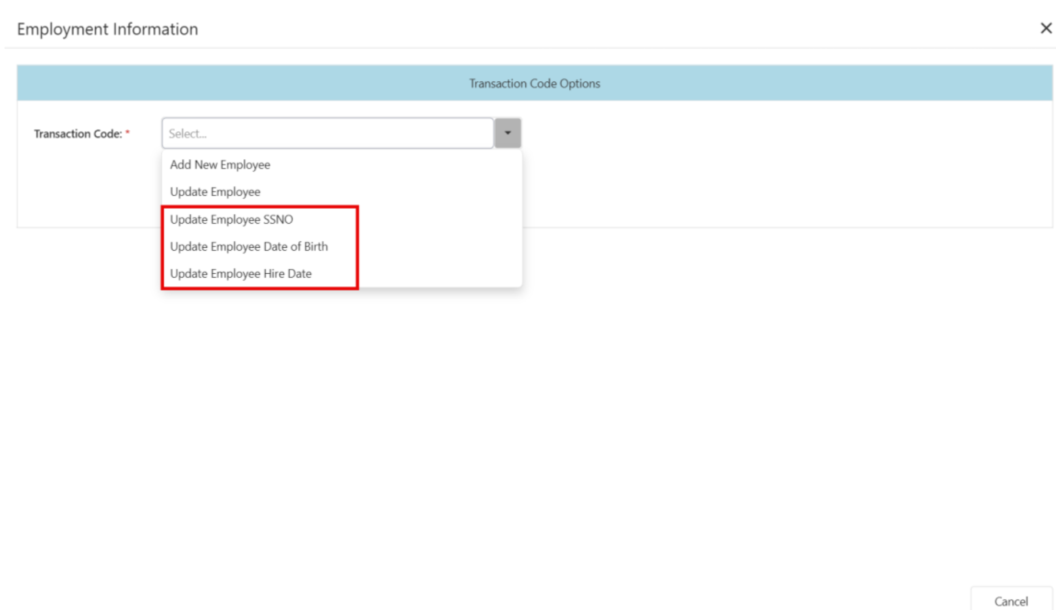
3. Enter the employee’s ETF Member ID <u>or</u> Social Security Number and click on the magnifying glass.



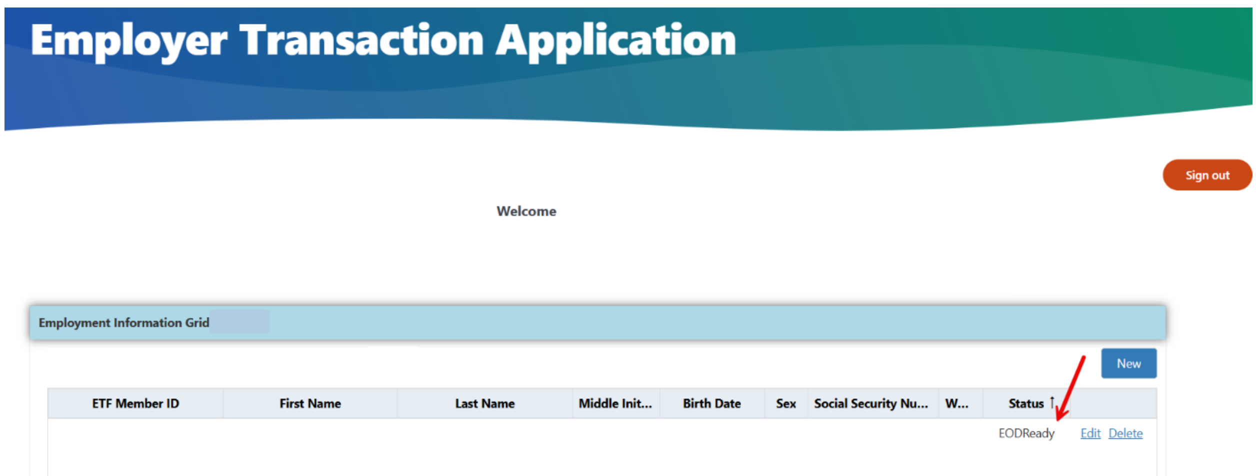
4. Once the employee's information displays in the 'Employment Information' box, you can click the different tabs (*Employee Demographics*, *Employee Contact*, *Employment*) and update any field that is not grayed out. Click 'Save' when complete.



Note: If there is a grayed-out field (*DOB*, *MID*, *SSN*, *Hire Date*) that you need to correct/update, please use the specific transaction code in the drop-down box for SSN, DOB, Employee Hire Date updates.



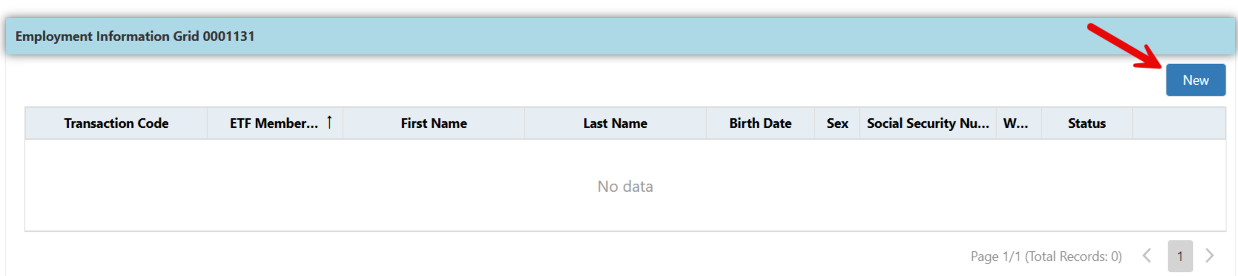
5. After saving your entry, you can then view the employee record in the table on the Employment Information Grid for your employer. The transaction will have an 'EODReady' status. You will have until the end of the day to 'Edit' the 'EODReady' transaction to update/correct any information before the transaction is processed overnight.



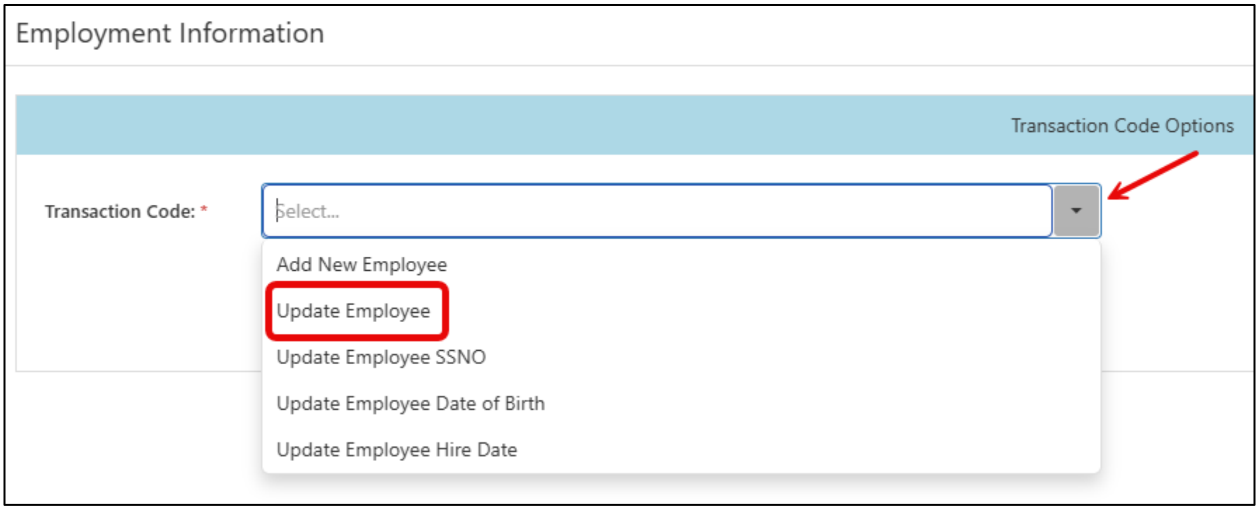
Termination an Employee

To terminate an employee record follow the steps below:

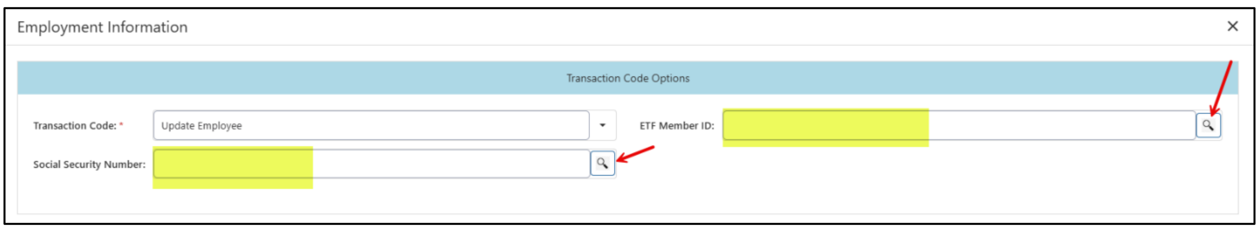
1. Click the "New" button. An Employment Information pop up box with transaction code options will appear.



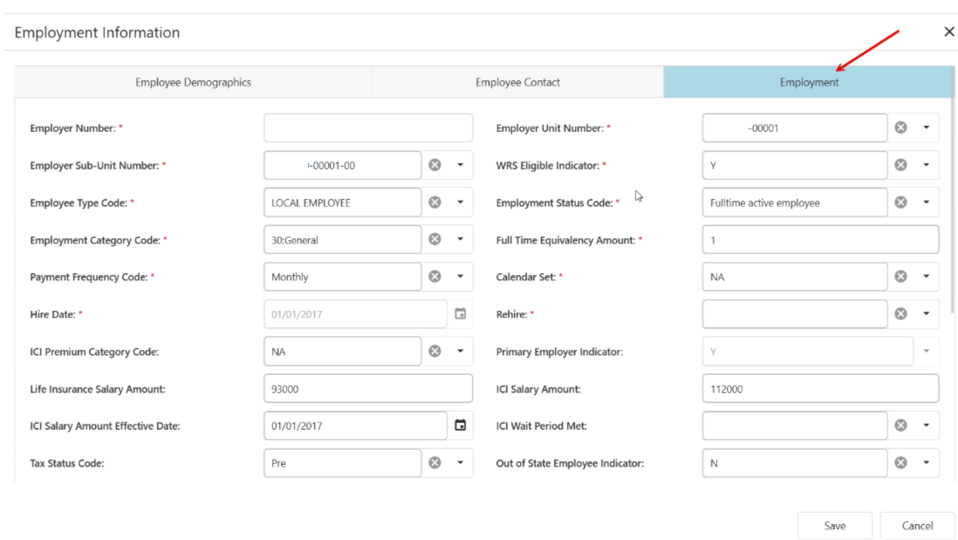
2. The grey arrow next to the box will cascade options for you to choose. Click on the down arrow and Select "Update Employee".



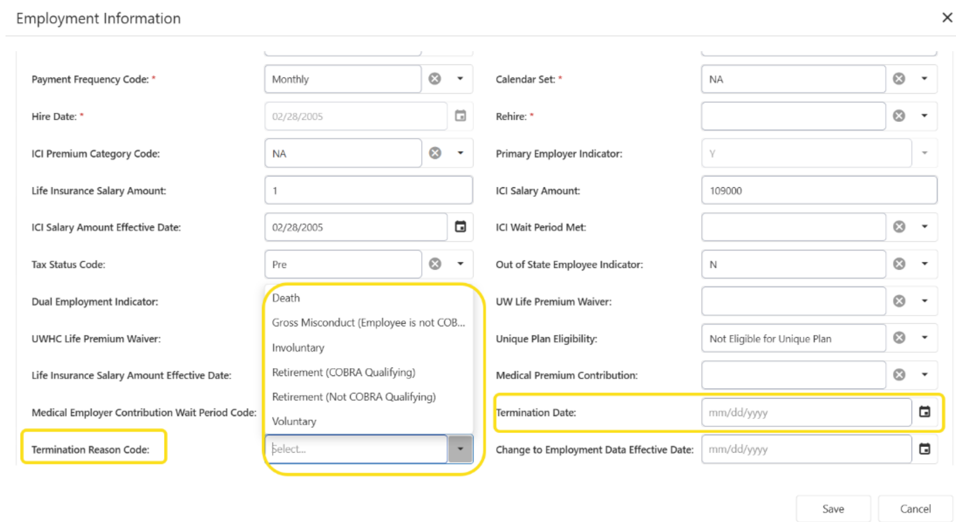
3. Enter the employee's ETF Member ID <u>or</u> Social Security Number and click on the magnifying glass.



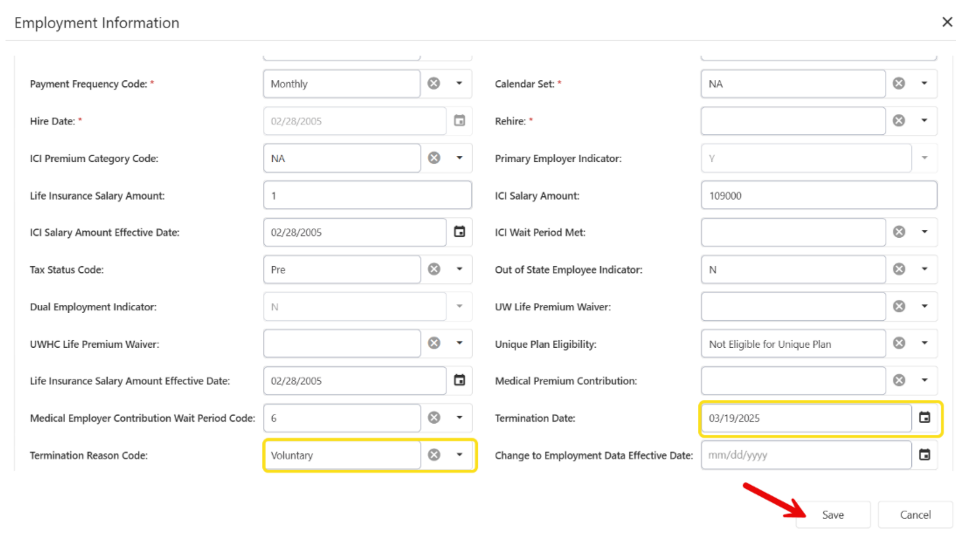
4. Once the employee's information displays in the 'Employment Information' box, click the 'Employment' tab to enter the termination detail.



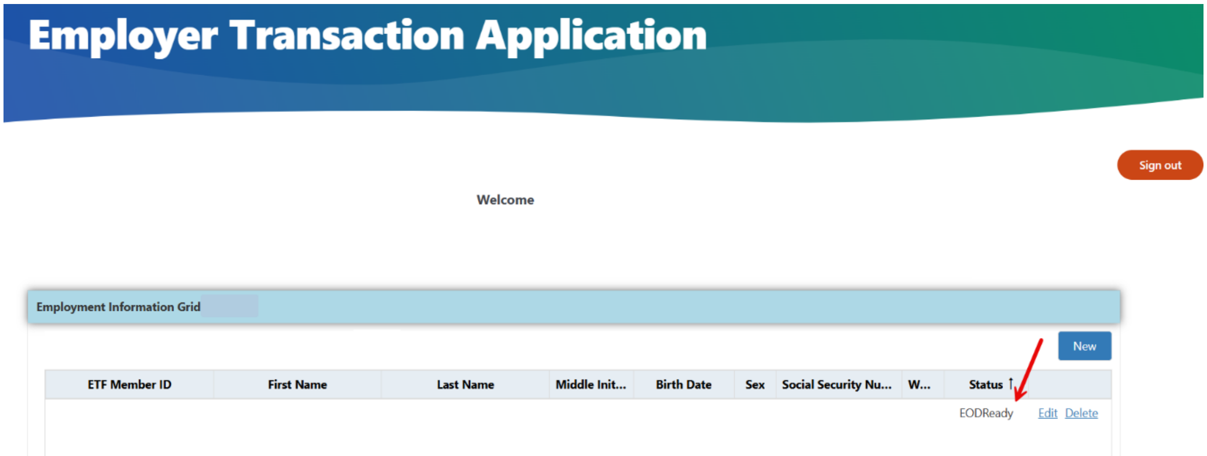
5. Scroll down to the bottom of the Employment screen options. Select the appropriate 'Termination Reason' from the drop-down box and enter the corresponding 'Termination Date'.



6. Once you have completed entering employee data, click Save.

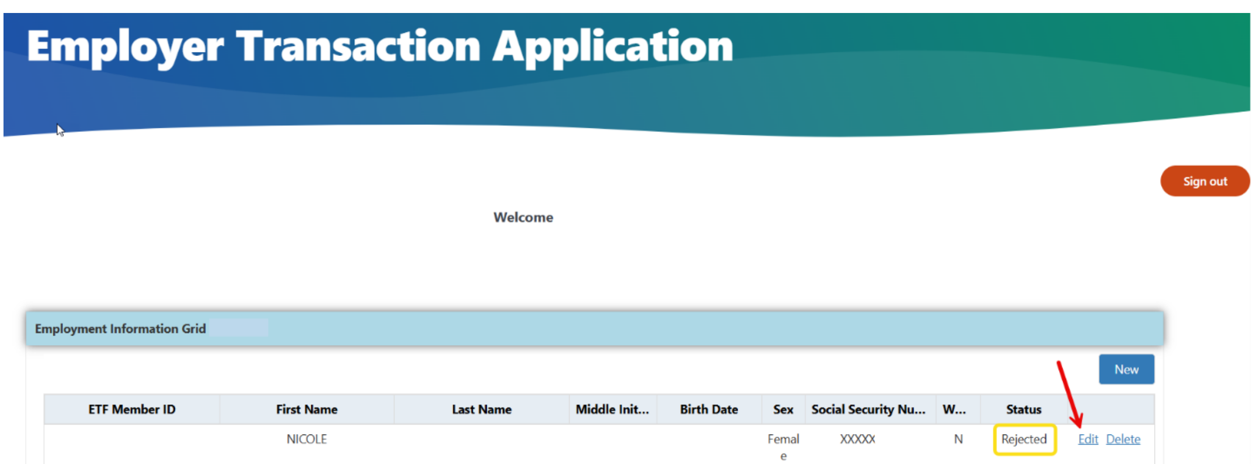


7. After saving your entry, you can then view the employee record in the table on the Employment Information Grid for your employer. The transaction will have an 'EODReady' status. You will have until the end of the day to 'Edit' the 'EODReady' transaction to update/correct any information before the transaction is processed overnight.



Editing an Employee (in Rejected or EOD Ready Status

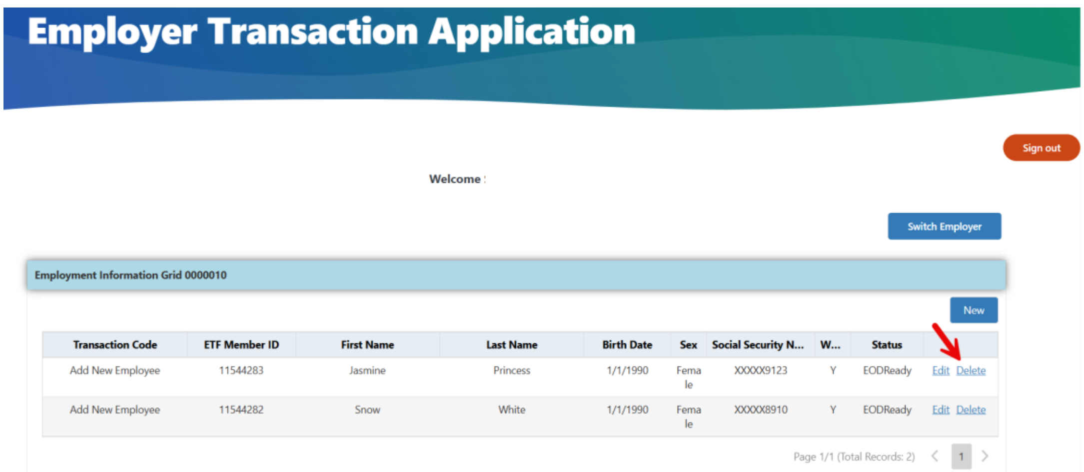
Selecting the "Edit" button next to the employee transaction from the 'Employment Information Grid' shown below will allow you to view and edit that employee's record. When the 'Edit' button is clicked on a 'Rejected' status transaction, the error message will populate to provide a reason the transaction was rejected. The transaction must be corrected until no error messages populate in order for the transaction to successfully save and become an 'EODReady' status that will process overnight.



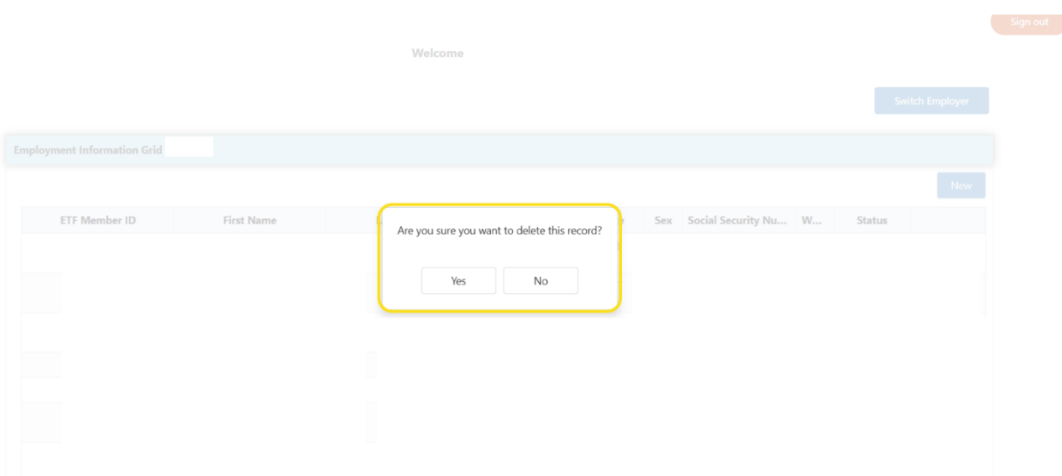
Deleting an Employee Transaction

Selecting the “Delete” button for an ‘EODReady’ (has not processed yet) and/or ‘Rejected’ status on the ‘Employment Information Grid’ shown below will allow you to delete a transaction that you processed.

For example, you processed an ‘Update Employee’ transaction to change an employee’s address effective April 1st but then learned the employee wasn’t moving to that address until June 1st. You will need to delete that address change transaction so that important insurance information is not mailed to the employee at the new address before they move there.



After selecting the ‘Delete’ button, a confirmation screen will appear. Select ‘Yes’ or ‘No’ to confirm whether you want to proceed with deleting that transaction.



ETA UI Key

ETA UI - Employment Information Screens		
Field Name	**Description**	**Permitted Values**
Employee Demographics		
Transaction Code	Type of transaction for employee information reporting you will be making. The type was chosen on the previous screen after selecting the **NEW** button.	Options available in the ETA drop-down
Employer Employee ID	The employee ID of the employee within the employer's HRIS Some employers have internal HR/payroll systems that assign employee ID numbers. This field provides a place for employers to provide ETF with that number, if they so choose, which ETF then store and use in future insurance reporting generated by the new IAS to aid employers in tying that information back to their own systems.	30 character limit
First Name	Employee's first name	If the employee has no first name, use 'FNU'
Last Name	Employee's last name	If the employee has no last name, use 'LNU'. Do NOT include suffix in last name field. There is a separate suffix field.
Middle Initial	Employee's middle initial	

Suffix	Employee's suffix	Options available in the drop-down. Do not include suffix in last name field.
Birth Date	Employee's date of birth. This is the month, day, and year the person was born.	Must be entered in **MM/DD/YYYY** format
Sex	Employee's sex at birth	Options available in the drop-down
Social Security Number	Employee's Social Security Number	Must be entered in **999999999** format, with no dashes
Employee Contact		
Mailing Address Line 1	Employee's Mailing Address line 1. Primary Address information - Address Number, predirectional, street name, street suffix	55 character limit
Mailing Address Line 2	Employee's Mailing Address line 2. Secondary Address information	55 character limit
Mailing Address City Name	Employee's Mailing Address city	30 character limit
Mailing Address Country Code	Employee's Mailing Address Country Code	Options available in the drop-down
Mailing Address State Code	Employee's Mailing Address State Code	Options available in the drop-down
Mailing Address Postal Code	Employee's Mailing Address Postal Code	15 character limit
Primary Phone Number (Personal)	Employee's primary personal phone	No dashes
Email Work Email Address	Employee's work Email address	
Personal Email Address	Employee's personal Email address	
Employment		
Employer Number	A unique identifier assigned by Employee Trust Funds to an employer that has a relationship with the WI Dept of Employee Trust Funds.	Prefilled by ETF
Employer Unit Number	Employee's Employer Unit. This can be used to break employee records into groups for reporting, billing, and security access.	Options available in the drop-down. See Unit Number options on page 20
Employer Sub-Unit Number	Employee's Employer Sub-Unit. This can be used to further break down employee records into subgroups for reporting, billing, and security access.	Prefilled when Employer Unit Number is selected

WRS Eligible Indicator	Indicates if an employee is covered by the WRS	Options available in the drop-down Enter **N** if your employer does not participate in the WRS
Employee Type Code	Employee type code. To be used for benefit eligibility.	Options available in the drop-down
Employment Status Code	Employee's employment status code - used for premium determination.	Options available in the drop-down **NOTE: Full-time is defined as 1044+ hours/year; part-time is 1043 or fewer hours/year.**
Employment Category Code	Employee's employment category code.	Options available in the drop-down Refer to WRS Administration Manual for more information.
Full Time Equivalency Amount	The full time equivalency of the employee's position. For example, standard FT is 1 and PT (including LTEs at local employers) is between .01 to .99. **NOTE: Calculated on an annual basis. To derive, determine the number of hours an employee typically works in a year and divide by 2080.**	**0.01 - 1.00**
Payment Frequency Code	Employee paycheck frequency	Options available in the drop-down
Calendar Set	This indicates which calendar set the Employee is in. This drives that the proper deductions are taken and sent to carriers.	A value of '9' or '12' is required for all UW Employees.
Hire Date	Employee's date of hire - drives insurance eligibility rules. For re-hired employees for whom a previous termination date has been reported, use the most recent Hire Date.	Must be entered in **MM/DD/YYYY** format

Rehire	This field indicates if the employee is being rehired within 30 days of termination into the same employer.	Options available in the drop-down. If this is a new employee or a rehired employer beyond 30 days select 'Not a rehire or rehired beyond 30 days'.
ICI Premium Category Code	Not applicable for UW	**Leave Blank or NA**
Primary Employer Indicator	Not applicable to UW	**Not editable**
Life Insurance Salary Amount	Employee's current (uncapped) annualized salary used for Life Insurance benefit calculations, rounded to the next higher thousand. Required if employer offers ETF life insurance benefits. **NOTE: Salary amount for this field should reflect the earnings on which current year premiums are based (for those employees currently enrolled) or would be based (for those employees not currently enrolled). See the ETF Life Insurance Administration Manual for further details on calculating these salary values.**	Must be entered in **9999999** format. Value entered must be at least **1000**
ICI Salary Amount	Employee's current annualized salary used for Income Continuation Insurance (ICI) benefit calculations. Required if employer offers ETF ICI benefits. further details on calculating these salary values.	Must be entered in **9999999** format.
ICI Salary Amount Effective Date	Date the employee's ICI salary became effective	**Must be entered in MM/DD/YYYY format**

ICI Wait Period Met	For UW Employee Type 04: Required. this field indicates if the employee has met the 12 months of WRS state service in order to receive employer contributions. This field must also be updated for employees if going from a "N" to a "Y". For All other Employers and Employee Types: leave blank	Options available in the drop-down
Tax Status Code	For employees enrolled in employer-sponsored plans, this value determines if premiums are deducted pre-tax or post-tax. This also determines eligibility for Pre-tax benefits.	Options available in the drop-down. Pre – Premiums deducted pre-tax Post – Premiums deducted Post-Tax. Not eligible for Spending Accounts (Pre-Tax Benefits) Elected Post – Treated same a Post but Employee voluntarily elected this option.
Out of State Employee Indicator	Indicates whether a State employee is eligible for a lower cost (Tier 2)Access Plan or Access HDHP based on working in a role that requires them to work out of state.	Options available in the drop-down
Dual Employment Indicator	Not applicable	Leave Blank or NA
UW Life Premium Waiver	Indicates whether an employee is on a life premium waiver or not. A value of 'Y' indicates employee is On Premium Waiver. A value of 'N' indicates employee is Not On Premium Waiver.	Options available in the drop-down
UWHC Life Premium Waiver	Not applicable	Leave Blank
Unique Plan Eligibility	Not applicable	Leave Blank
Life Insurance Salary Amount Effective Date	Date the employee's life insurance salary become effective	Must be entered in **MM/DD/YYYY** format
Medical Premium Contribution	Not applicable	Leave Blank or NA

Medical Employer Contribution Wait Period Code	The number of months an employee must wait until employer contributions toward health Insurance will begin. **NOTE 1: Complete this value for ALL employees eligible for ETF-administered health insurance, even if they are not enrolled in the benefit. This includes: 1) all WRS covered employees at the employer, regardless of full- vs. part-time status, and 2) any non-WRS covered employees eligible for health insurance.** **NOTE 2: If coverage is effective at the beginning of the next month, enter 0.**	Options available in the drop-down Wait Period Codes: 0 – 0 Months 1 – 1 Month 2 – 2 Month 3 – 3 Month 4 – 4 Month 5 – 5 Month 6 – 6 Month NA – Not Applicable

Unit Number:

Employer Unit Name	Employer Unit Number	Employer Sub-Unit Number	Employer Sub-Unit Name
UW-Eau Claire	0001131-00001	0001131-00001-00	UW-Eau Claire
UW-Green Bay	0001131-00002	0001131-00002-00	UW-Green Bay
UW-La Crosse	0001131-00003	0001131-00003-00	UW-La Crosse
UW-Madison	0001131-00004	0001131-00004-00	UW-Madison
UW-Milwaukee	0001131-00005	0001131-00005-00	UW-Milwaukee
UW-Oshkosh	0001131-00006	0001131-00006-00	UW-Oshkosh
UW-Parkside	0001131-00007	0001131-00007-00	UW-Parkside
UW-Platteville	0001131-00008	0001131-00008-00	UW-Platteville
UW-River Falls	0001131-00009	0001131-00009-00	UW-River Falls
UW-Stevens Point	0001131-00010	0001131-00010-00	UW-Stevens Point
UW-Stout	0001131-00011	0001131-00011-00	UW-Stout
UW-Superior	0001131-00012	0001131-00012-00	UW-Superior
UW-System Wide	0001131-00013	0001131-00013-00	UW-System Wide
UW-Whitewater	0001131-00014	0001131-00014-00	UW-Whitewater

ETA Updated/Enhancement Requests

1. The ability to search for an employee by SSN and/or MID on the *Employment Information Grid* in the ETA for transaction(s) that have been entered for them that day, so that the transaction can be reviewed and/or edited without having to manually page through all pages.
2. Request to make an audit reporting available regularly from the ETA UI versus a manual SQL request process.
3. Implementing security in ETA UI that limits which staff can alter data that came from the file.
4. Allow special characters in member name.