

WBA – EBC Benefits Portal Checklist

(Add/Change/Terminate Benefits)

Adding a New Employee in Benefits Portal

Add employee online

Benefits Portal → Administrator Home Page → Manage Employees → Add New Employee

- a. Complete General Information, Qualifying Event, etc.
- b. Send the employee the Online Guide for Enrollees to log into the Benefits Portal to complete their transaction. Benefits Portal → Administrator Home Page
- c. Once employee has completed their transaction, you will receive an email indicating a transaction is awaiting your approval. Review the employee's elections and approve to send transaction.

Adding Benefits to an Existing Employee in Benefits Portal

Process Benefits Wizard Transaction Online

Benefits Portal → Administrator Home Page → Manage Employees → Existing Employees

- a. Search for applicable employee and select View/Edit.
- b. Click Benefits Wizard.
- c. Select Qualifying Event and enter date.
- d. Follow screens to complete transaction.
- e. Once completed, employee will receive an email notification to log in to the Benefits Portal to review and approve the transaction.
- f. Once employee has approved the transaction, you will receive an email indicating a transaction is awaiting your approval. Review the transaction and approve to send transaction.

Terminating an Employee in Benefits Portal

Process employee termination online

Benefits Portal → Administrator Home Page → Manage Employees → Existing Employees

- a. Search for applicable employee and select Terminate Plans.
- b. Enter employee termination date in Qualifying Event Date.
- c. Check all plans and click Terminate Plan(s).



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