

**Wisconsin Department of Employee Trust Funds**  
**RFP ETH0052-54 Addendum Number 1**  
**ANNUAL COMMUNICATION OVERVIEW**

MONTH	ACTIVITY OVERVIEW
<b>January</b>	<ul style="list-style-type: none"> <li>■ Carryover and runout period (1 electronic*)</li> <li>■ End of plan year reminders (1 electronic*)</li> <li>■ End of plan year substantiation (1 electronic*)</li> </ul>
<b>February</b>	<ul style="list-style-type: none"> <li>■ Carryover and runout period (1 electronic*)</li> <li>■ End of plan year reminders (1 electronic*)</li> <li>■ End of plan year substantiation (1 electronic*)</li> </ul>
<b>March</b>	<ul style="list-style-type: none"> <li>■ Carryover and runout period (1 electronic*)</li> <li>■ End of plan year reminders (1 electronic*)</li> <li>■ End of plan year substantiation (1 electronic*)</li> </ul>
<b>April</b>	<ul style="list-style-type: none"> <li>■ Benefit information and helpful tidbits (1 electronic*)</li> </ul>
<b>May</b>	<ul style="list-style-type: none"> <li>■ Substantiation (1 electronic and 1 mailer)</li> </ul>
<b>June</b>	<ul style="list-style-type: none"> <li>■ Benefit information and helpful tidbits (1 electronic*)</li> </ul>
<b>July</b>	<ul style="list-style-type: none"> <li>■ Substantiation (1 electronic and 1 mailer)</li> </ul>
<b>August</b>	<ul style="list-style-type: none"> <li>■ Benefit information and helpful tidbits (1 electronic*)</li> </ul>
<b>September</b>	<ul style="list-style-type: none"> <li>■ Open enrollment reminder (1 electronic*)</li> </ul>
<b>October</b>	<ul style="list-style-type: none"> <li>■ Open enrollment reminders (4 electronic and 1 mailer)</li> </ul>
<b>November</b>	<ul style="list-style-type: none"> <li>■ End of plan year substantiation (4 electronic and 2 mailer)</li> </ul>
<b>December</b>	<ul style="list-style-type: none"> <li>■ End of plan year reminders (2 electronic and 1 mailer)</li> <li>■ End of plan year substantiation (4 electronic and 2 mailer)</li> <li>■ New plan year welcome letter (1 electronic and 1 mailer)</li> <li>■ Debit cardholder agreement and debit card (1 mailer)</li> <li>■ Carryover and runout period (1 electronic*)</li> </ul>
<b>Throughout the Plan Year</b>	<ul style="list-style-type: none"> <li>■ Substantiation (electronic*)</li> <li>■ Account management communications (electronic*)</li> <li>■ Internal Revenue Service updates (electronic*)</li> <li>■ Debit cardholder agreement and debit card (new participant or replacement debit card) (mailer)</li> </ul>

*\*In the event a Participant does not have an email address on file to receive an electronic communication, the Contractor will issue the communication via mailer.*