

Working Group Members

Name		Name		Name	
Ashley Carey	X	Debbie Morrison		Monica Hetherington	X
Ayla Baldwin	X	Elizabeth Jones	X	Stacey Havel	X
Betty Gibson	X	Heidi Stricker	X	Tapati Pal	X
Cheri Alvarado	X	Melanie Ramirez (sub for Karen Hentschel)	X	Tina Flores-Nevarez	X
Cynthia Todhunter	X	Martha Alexander	X	Tina Pennington	X
DawnAnn Wilson	X	Mary Canales	X	Vicki Welch	X

Workday Services – Meredith Fox, Laura Fritsch

Review Open Action Items

- I. **New benefit event for mid-year AD&D changes – APPROVED to proceed**
 - i. Policy allows us to change between EE & EF AD&D plans mid-year, but employees cannot change the dollar amount.
 - ii. Workday doesn't let us enforce these restrictions, so we have locked down ALL mid-year AD&D changes.
 - iii. This new benefit event type would only be selectable by benefit partners, and would route to the benefit partner to complete. **REVISED – Route to employee to complete event, then route to benefit partner for approval.**
 - iv. Employees would be required to submit a paper form authorizing this change.

Pros:

- Would avoid use of the “Administrative Correction” which can allow unintended changes
- Worker history would clearly show why a benefit event was triggered

Cons:

- Paper forms would be required – **Mary Canales would rather not complete paper forms. Stacey Havel and DawnAnn Wilson agree.**
- Room for error by Benefit Partners (Workday cannot enforce the rule that the amount has to stay the same)
- Yet another additional option in the drop down when selecting a benefit event

- II. **Allow Retirees to answer Benefit Eligibility Questions – APPROVED to proceed**

- i. Currently, retirees cannot answer “Additional Data Questions” themselves.
- ii. If a retiree needs to update an answer, they have to submit a paper form and have the benefit/retiree partner make the change.

Pros:

- Self-service for retirees who are computer savvy.

Cons:

- May be confusing for retirees (this is NOT an intuitive process)



III. Add AD&D to Life Benefit Events but disallow any changes – APPROVED to proceed

- i. Currently we receive numerous tickets from employees & benefit partners fearing that AD&D is being dropped by the benefit event since it is not listed on the summary page.
- ii. By including AD&D in the benefit event, employees would easily be able to see that their AD&D is still active.

Pros:

- Reduce questions/tickets/anxiety from worried employees
- More accurately display employee's coverage on the event submission page

Cons:

- If an employee DOES need to make a change and we have decided to proceed with #1 above, the two events would combine into a hybrid event that would have to be submitted by the benefit partner (and require a paper form).
- The summary page for the event would still not display a comprehensive list. For example, we aren't going to add TRS or ORP to these benefit events.

IV. Require Beneficiaries for Life Plans – DECLINED

V. Add Evive Link to Benefits Worklet – APPROVED to proceed

- i. Should we add an additional link to MyEvive within the Benefits Worklet?
- ii. We have gotten several inquiries about where to go to print cards, etc. and this would allow employees to go directly to MyEvive without having to leave Workday to go back to SSO first.
- iii. The existing SSO link would not change.

Discussion

I. Open Enrollment

- 9/1 hires in own benefit group worked well.
- Move 9/1 retirees to their own group next year?
- Coordination of events being turned off caused issues.
- EOI Issues – is there a way to notify employees if their EOI is still pending? Ops could send EOI reminder emails through the month of September?

II. 12/9 Pilot Program

- Will revisit at 12/9 debrief meeting.
- Pre-hires don't have a benefit partner so WDS had to add the custom ID.

III. Workday Today Focus Group – Tina P., Tapati P. and Heidi S. volunteered

- For this, we want to understand the change management and training needs with the help of a focus group.
- We will be enabling Workday Today for all employees in TAMUS1 after 9/2 refresh.
- The plan is to provide access to the focus group to TAMUS1 with Workday Today enabled for 2 weeks.

- We will have a meeting after the 2 weeks to discuss and get feedback from the focus group.
- IV. Job Aids**
 - Discussion about which Job Aids are the most used and highest priority for us to convert to the new UI.
- V. Add a To Do when new hire is ACA eligible on hire to prompt immediate benefits hire event – APPROVED to proceed**
 - Notification to benefit partner and employee telling them they are ACA eligible on hire.
 - Different text for each.

Open Discussion and Action Items

- I. Reduce number of days to submit Job Change benefit event**
 - 60 days to complete currently.
 - Could it be finalized within three weeks but then have a policy that allows them to change their coverage if they reach out to the benefits office?
 - Discuss with SBA.
- II. Create separate groups for retirees by workstation**
 - Which To Do steps are the issue? Can we use segmented security to lessen the impact to benefit partner inboxes?
 - Discuss with Staffing.
- III. Update benefit forms to more easily translate to Workday**
 - Forms are confusing to retirees.
 - Discuss with SBA.
- IV. Add more wording on the Benefit Change page to clarify HOW to see dependent names**
 - Vicki W. suggests relocating General Instructions, as employees are not seeing it in its present location.
- V. Can the turning off of benefits be independent or moved up in the Termination BP?**
 - Per DawnAnn W., Vacation Payout To Do, Offboarding Task, ORP Vesting To Do currently hold up the termination of coverages to the carriers.
 - Discuss with Staffing.
- VI. OE Update – Employees who enrolled in coverage in August had an issue with OE events finalizing before the New Hire benefit event.**
 - This was caused because coordination of events was turned off. It has been turned back on and a list of impacted employees was sent to benefit partners.
- VII. Workday Sandbox**
 - Tapati P. asked if Sandbox could be refreshed more often.
 - Sandbox is refreshed every Friday evening. This is a Workday restriction and cannot be altered.



VIII. SGIP Reimbursement

- Recommend doing an allowance instead of an EIB. How are allowances set up? Can benefit partners do this?
- Discuss with Staffing.