Benefits Working Group
Meeting Minutes – February 28, 2022

THE TEXAS A&M UNIVERSITY SYSTEM

Working Group Members

Name		Name		Name	
Ashley Carey	X	Debbie Morrison	X	Stacey Havel	X
Ayla Baldwin		Elizabeth Jones	X	Tapati Pal	X
Betty Gibson	X	Heidi Stricker	X	Theresa Perez	X
Cheri Alvarado		Karen Hentschel	X	Tina Flores-Nevarez	
Chris Burns	X	Martha Alexander	X	Tina Pennington	X
Cynthia Todhunter	X	Mary Canales	X	Judy Kurtz (for Vicki Welch)	X
DawnAnn Wilson	X	Ninette Portales	X		
Deeps Vyas	X	Patti Toler	X		

Workday Services – Meredith Fox, Laura Fritsch, Wally Wellborn
System Benefits Administration – Leah Smith

Review Open Action Items

I. **Create a Questionnaire for Employees to answer during Onboarding that asks them for their preferred benefit start date – APPROVED to proceed**
   i. This would prevent Benefits Partners from having to email employees to ask for their preferred start date.
   ii. Preferable for those member campuses who do SGIP reimbursement.
   iii. Must get SBA approval to proceed.

II. **Certified Other Medical and Eligibility – ON HOLD (Move to Discussion Items)**
   i. Discussion to change the eligibility rules for Medical to still show MED as a plan option when Employees have Certified Other.
   ii. This would help Workday assign the correct codes on the ACA forms and fix some background issues.
   iii. Employer Paid Dental/Vision plans would continue to only show for those who Certified Other.
   iv. Meredith working on new option in Workday. Will test and send screenshots to working group members.

III. **Change Routing of Medical Change Only Benefit Event – APPROVED to proceed**
   i. Route benefit event to the Retiree for completion to remove necessity of paper form.
   ii. Approval required by Benefit Partner if Retiree does not enroll in 65+ plan.
   iii. Must get SBA approval to proceed.

IV. **Pay Result Details Access – ON HOLD (Move to Discussion Items)**

i. Request to allow Benefits Partners to see ALL pay results for ALL Employees system-wide.
ii. This would allow Benefits Partners to work discrepancy reports for Employees who have moved between system members.
iii. Could SBA be in charge of working cross-workstation discrepancies instead?
iv. In need of a good business reason to proceed.

V. **Create New Benefit Group: FT Monthly 12/9 in SGIP Wait – PENDING VOTE**

i. Employees who started in the summer and planned to start benefits 9/1 in the 12/9 benefit group couldn't be set up easily/correctly.
ii. This would allow them to complete their Hire benefit event over the summer to start benefits 9/1 in the 12/9 benefit group, and it would show their premiums correctly.

VI. **Make Onboarding Steps Route to Benefits Partner instead of Fellows – ON HOLD (Move to Discussion Items)**

i. Follow up with Vicki Welch, as she made the suggestion but could not attend meeting.
ii. TAMU prefers Fellows complete their Onboarding themselves.

VII. **Force Employees to Waive TDA at Retirement – PENDING VOTE**

i. Currently, Employees have the option to keep their current plan in case they intend to return to work soon after retirement and want to continue to contribute.
ii. SBA has requested that we force them to waive all coverage as part of the Retirement benefit event.

VIII. **Do Not Have INT160 Set the SGIP Date Driver for Return to Retire (Worker Not Already in Workday – PENDING VOTE**

i. TAMU would appreciate the Review Onboarding Questions To Do being removed but would rather not create additional manual work if Workday can set the SGIP Date Driver.
ii. Tarleton would like to discuss with Benefits Partners who complete this process regularly.

IX. **Create TRS Letter Requested and Received Flag – APPROVED to proceed**

i. TRS generates Confirmation of Annuity letter to Retiree which they must then provide to SBA so they have it on file. There is nothing in Workday that remains in the Benefits Partner inbox to remind them that this has not yet been received.

ii. This would be an additional Custom Other ID to maintain.
iii. Must get SBA approval to proceed.

Discussion

I. **Create "My Inbox" Report for Benefits Partners**

II. **Add Report for New TRS Enrollments without TRS9 Date**
   - Requested by Reporting Team.
   - Sample created in TAMUS1.

III. **New Job Aid: How to Complete Hire Benefit Event**
   - Discuss with Training Team.

IV. **ACA and Working "As Needed"**
   - May be some benefits to having a Notification/To Do sent to Benefits Partners when ACA is offered.
   - Benefits Partners could review whether or not Employee is indeed ACA eligible.
   - Low priority – not many members running into this issue.
   - Add value of X for ACA Eligible Custom ID to Exclude from ACA?

V. **Disable Some of the Benefits Partner Alerts on Change Benefits for Life Event**
   - Example: Change of Birth Date Alerts when the Employee is not in a benefits eligible position.
   - Discuss with Staffing Team.

VI. **Add Alert When Hire Date is Changed**
   - When Hire BP is corrected to change the date, alert would be sent to Benefits Partners so they can update the TRS9 Date.
   - Discuss with Staffing Team.

Open Discussion and Action Items

I. **Employees Retiring and Going to 65+ Plan**
   - Need an easier way to change them from A&M Care to 65+ if they receive Medicare card and complete enrollment prior to retiring instead of cancelling task and having them complete a new task.
   - Potential issues due to Termination not being entered and/or Medicare A/B information not received/entered.
   - Discuss with SBA regarding concerns with files going to EGWP.

II. **Military Leave Dependents**
   - Isolated issue.
   - Tabling discussion for now.

III. **Add Medicare Acknowledgement Form as part of Workday Retirement Process**
   - Currently requires a paper form to be signed by Retiree and imaged by SBA.
   - Acknowledges that Retiree is aware of the requirement to enroll in Medicare A&B when they are eligible.
   - Acknowledgement would take place in Workday, similar to acknowledgements used in Hire BP.
   - 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. Not sure is this is configurable.