
Attendees

Martha Alexander	Ayla Baldwin	Chris Burns
Mary Canales	Ashley Carey	Cheri Garza-Alvarado
Betty Gibson	Casey Martinez	Vicki Welch
Dawn Ann Wilson		

Announcements/Completed Changes

- **Trello**
 - Some suggestions have been moved to Discuss with Other Areas before moving forward. Notations have been added for which functional area.
 - Please look for notes on your suggestions requesting more information.
 - Please add your new suggestions to Suggestions from Group and add NEW label for items with new notes or new item cards in Trello

Upcoming Changes

- Survivor Job Aid
- Remove >90 Days Medicare Change
- Employees Retiring and moving to 65+ Plan
- Separate Groups for Retirees
- Benefits Summary for Wellness

Discussion Items

Onboarding Questions Project

- Starting an overhaul project for Onboarding Questions
- Suggestions and Recommendations have been moved to the OBQ Project Folder in Trello
- May request volunteers to help workshop the questions
 - Vicki Welch
 - Martha Alexander

Add End TRS/ORP Benefits Event

- Event to Waive TRS/ORP participation if employee no longer eligible/contributing
- Please add votes on Trello

Email New Hires with Benefits Info & Links

- SBA approves proceeding with Caveats
- This is not a proof of offer of insurance to employee
- Please add votes on Trello

Split Job Change before SGIP Events

- Add Job events need to behave more similar to Hire events
- Available for manual selection by Benefits Partners
- Only Job Change will be automatically triggered with 60 day wait for coverage
- Allows to be in coverage prior to SGIP
- Keep separate from hire to avoid confusion
- Please add votes on Trello

ACA on Hire

- Mostly affecting Rehires who are eligible on Start Date
- Create separate To Do for Review SGIP if person is ACA on Hire
- Please add comments and votes on Trello

Extending 30/31 Day Time Frames

- This is outside of the scope for Working Group
- Benefits Partners should put in the request to SBA

Options for 9/1 dated events entered after 9/1 interfering with OE

- Job/Data changes effective 9/1
- Moving out of 12/9 or Biweekly to Monthly pay frequency change dated 9/2
- Starting coverage 9/1 or in August
- Please send tickets with specific examples

Mid-Year FSA Changes

- 12/9 people are being put into their own version of the plan to help alleviate problems with remaining paycheck remaining calculations.
- Manual work will be needed for people moving out of 12/9 to convert FSA Accounts

Retirees turning 70/80

- Fine Tune logic to include only retirees who will have coverage changes

Dependent Documentation upcoming features in Workday

- May work similar to EOI

- May require changes in policy
- Changes coming as Workday features are released

Cross-Functional Items

Staffing

- Employees Late with Onboarding
 - If onboarding is stuck at the same step, daily email to EE, Supervisor, and Awaiting Person
 - Benefits Partners are having to monitor and reach out. Want more frequent and continual reminders until the steps are completed.
 - Especially problematic for employees who wish to start benefits on start date or before SGIP

Action Items

- Notification for New Hires after Submission
 - Please add clarification and specifics for notifications on Trello
- Disable Alerts
 - Add the names of Alerts in Trello which are no longer needed.
- Snapshot of Employee Job Record based on date
 - Reporting team creating report based on All Jobs report
 - Include Percent Effort and Type of Position
 - Needed for employees with positions at multiple members
 - Add any suggestions or needed fields in Trello
- Alert to Retiree Electing Benefits for OL
 - OL must be re-elected manually
 - How can employees be warned that they must sign up for Retiree Optional Life?
 - To Do/Approval step generated to Benefits Partner who would reach out to retiree
 - Please add additional suggestions to Trello
- Custom Reports on Menus
 - Where in the menu would work best for Custom Reports
 - Please add suggestions to Trello
- Add Document Types to HRC
 - Add document types you would like added to HRC in Trello Card
- Automated Emails for Reports
 - What reports would you like to see emails for?
 - What information should be included in the email?