Benefits Working Group

Meeting Minutes: May 17, 2023

THE TEXAS A&M UNIVERSITY SYSTEM
OFFICE OF INFORMATION TECHNOLOGY

Attendees

Albert Rios	Ayla Baldwin	Cynthia Todhunter
Janna Johnson	Casey Martinez	Mia Cisneros
Debbie Morrison	Vicki Welch	Cheri Garza Alvarado
Ninette Portales	Dawn Ann Wilson	Martha Alexander

Announcements/Completed Changes

- **ACA on Hire To Do**
    - Staffing is working on adding the To Do step when employee is ACA eligible on hire.
- **Survivor Job Aid**
    - Training Team is working on adding notes
- **90 Day To Do in Medicare Change**
    - The separate 90 Day To Do was removed from the Medicare Change BP.
    - Benefits Partners will no receive the same To Do for any Medicare Change.
- **Allow Future Retirees to enroll in 65+**
    - If Medicare A&B information is added, future retirees may now enroll in 65+
    - Must be within 7 days of their retirement date
- **End TRS/ORP Benefit Event**
- **All Jobs as of Date Report**

Upcoming Changes

- Add Soft Warning/To Do when employee elects not to enroll in benefits
- Additional Document Types in HRC
- Onboarding Questions Project
- Custom Reports on Menus
- Retiree ABL Under 70
    - Create new plan to use flat rate
- Fine Tune Alerts to Retirees turning 70/80
- To Do to Benefits Partner for Retirees Not Electing OL

Discussion Items

Requests Discussed with SBA

- Require Dependent Certification for Managing Conservatorship
    - SBA states there are not enough of these to justify the needed updates.
    - Waiting on additional Workday Functionality
- Updating the Attestation for Hire
    - SBA has no objections but considers this as part of New Hire Orientation
- Email during Hire prior to Onboarding with Benefits Information
    - No objections however does not replace New Hire Orientation
    - Link to Benefits Guide should also be included in Offer Letter
- To Do for Employee to Upload Supporting Documents for Gain/Loss Coverage
    - SBA does not want to implement this out of concern for incorrect documents being uploaded
    - SBA states they are working on a form for the employee to provide to the former benefits provider to sign
- Acknowledgement for retirees uncomfortable making their own benefits elections.
    - SBA will not allow elections made on the retiree's behalf
    - If Retiree wants someone else to make changes for them, they must provide Power of Attorney

Automated Emails for Reports

- No suggestions for additional emails/report alerts

Auto-complete To Do/Tasks in Employee Inbox

- Need to move forward stalled business processes when to do or tasks are stuck in employee inboxes
- Project to take advantage of new Workday functionality
- Discuss with SBA

Request for Training

- Open Enrollment Training
- 12/9 and 12/9 no SGIP
- Summer Premiums
- ACA/ACA Scenarios
- TRS/ORP Custom Overrides
- Custom IDs
- TRS

Alerts for mid-year FSA enrollment

- Ways to warn employee that their election is only until 8/31
- Already stated in enrollment instructions but not noticeable

Dependents during Enrollment

- Can dependents be added during enrollment event, instead of needing separate Dependent event?
  - Not able to launch the related approvals and to dos in the Dependent BP if added from Enrollment
  - May not be able to prevent adding uncertified dependent grandchildren
  - Would require HAC approval before implementation
- Show dependents during plan selection step instead of needing to confirm and continue
  - Workday delivered functionality unable to change
  - Alternative solutions, more clear instructions
- Treating Dependents similar to EOI
  - Allowing them to be added to coverage pending certification
  - Workday is promising this functionality in the future but not delivered

Benefits Eligible Employees not getting Additional Data questions

- Transfers not getting the questions if they are moving from student worker to benefits eligible position.
- Questions are needing to be triggered manually
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Cross-Functional Items

Reporting

- Report for New TRS Enrollments with no TRS9 Date
  - Issue for student workers moving to full time position
  - More verbiage needed in the To do/Alert step to remind Benefits/HR Partners that TRS9 date is needed
  - Possibly change INT160 to update
  - Please add example UINs to Trello

Staffing

- Benefits Eligible Employees not getting Additional Data questions
  - Transfers not getting the questions if they are moving from student worker to benefits eligible position.

    - Questions are needing to be triggered manually
    - Questions should be launching for Hire and Change Job business processes. Still unable to launch automatically with Add Job due to Workday limitation
    - Please send example UINs if the employee should be receiving the questions through Hire or Change Job and isn't

Action Items

- July meeting may be moved out due to Open Enrollment