
Attendees

Angelia Alaniz	Martha Alexander	Chris Burns
Ashley Carey	Cynthia Todhunter	Jennifer Escamilla
Betty Gibson	Stacey Havel	Jennifer Valdez
Jessica Solis	Janna Johnson	Ninette Portales
Irma San Miguel	Hollie Trussell	Vicki Welch

Announcements & Completed Changes

- To Do for HR18 added for termination and retirement events if employee was ever enrolled in TDA
- Link in the To Dos relating to Dependent Documentation updated to open on page 7 of Benefits Guide PDF.
- Due Dates removed from Business Processes
 - Due dates will no longer be displayed on inbox tasks since they did not represent the actual submit by date for the employee
 - Submit By Dates will still be present

Upcoming Changes

- The ORP Passive Event will no longer generate ORP events when an employee has an in progress ORP Newly Eligible event. Target Release: 10/03/24
- Basic Life will be included on Birth/Adoption and Marriage for Retiree events to help reduce validation errors for employees enrolling in dependent life coverages. Target Release: 9/26/24

Discussion Items

Allow Visibility of GA Location in Workday

- Need to be able to see GAs in Workday to re-assign to correct area
- Please add your name to the endorsement and add use cases to the card in Asana

Dependent Court Orders

- Utilize Fields in Workday to enforce Benefits Enrollment
- Court Orders do have issue and end dates
- Reports and additional training would be provided if implemented
- Please add endorsement if this is a feature that would be useful

12 over 9 Guide

- Create Step by Step guide for new 12 over 9 Enrollees
- Working Group Members are requesting a checklist of things that need to be done for employees during 12 over 9 enrollment

ACA Eligibility Change Event Type for EEs Losing Eligibility

- Update Notification of benefits eligibility to only send when EE is gaining due to ACA
- Create separate event for gain/loss or use existing for both scenarios
- Workday will update the condition rules for the notification to only send if the employee is gaining eligibility.
- The recommendation will still be to use the Job Change benefit event for loss of eligibility.

FMLA Leave Event routing

- Event currently routes only to Benefits Partner
- Could route to both BP and EE?
- Add endorsement in Asana

Allow Add Dependent in Change Benefits for Life Business Process

- Employees will need to provide documentation before adding
- Trigger some kind of to do, notification, approval to benefits partner?
- This in on hold to discuss with SBA

Open Enrollment and August/September Hire Events

- Do we need to separate August hires into their own benefits group and prevent Open Enrollment?
- Alternate Open Enrollment will need to be launched for employees who do need an OE event
- Workday does not consider delayed benefits start dates as a “waiting period” and will launch open enrollment
- Open Enrollment Discrepancy Report will be updated to catch employees starting coverage on hire who will also need OE
- Add Endorsement in Asana for approval

Lock Benefit Tasks for New Hires within 60 Day Wait

- Prevent changes to benefits for employees prior to SGIP start date
- Employees mistakenly launching benefit events instead of using their existing hire event

- Make considerations for employees who have life changes during the period (has hire event and begins benefits on hire, then has a QLE which would be effective after benefit start)
- Add approval step before event creation to prevent changes
- Please add endorsement in Asana

Cross-Functional Items

Training

- Create 12 over 9 Guide
 - Working Group is requesting a step by step guide for benefits partners to use during the 12 over 9 enrollment period

Action Items

- View GA in Workday: Working Group Members add themselves to endorsement & add use cases to Asana Card
- Dependent Court Orders: Working Group Members add endorsement in Asana to approve
- Meredith/Vicky speak with Training about 12 over 9 guide/checklist
- FMLA Leave of Absence: Working Group Members add endorsement in Asana to approve
- Open Enrollment and August/September enrollments
 - Meredith will do analysis of the number of affected employees both monthly and biweekly
 - add endorsement in Asana to approve

Next Meeting: 11/20/2024