# Benefits Working Group

Meeting Minutes: December 11, 2024

## Attendees

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| --- | --- | --- |
| Martha Alexander | Chris Burns | Jennifer Escamilla |
| Betty Gibson | Ninette Portales | Hollie Trussell |
| Vicki Welch | Walter Welborn | Sri Kamarthi (WD Payroll) |
| Scott Ritter (WD Payroll) | Janna Johnson | Albert Rios |
| Ashley Carey | Debbie Morrison |  |

## Announcements & Completed Changes

* The ORP Passive Event will no longer generate ORP events if the employee has an in progress ORP Newly Eligible Event.
* Notification Conditions on ACA Eligibility Change Event Type Updated
* Dependent Court Orders Job Aid is now available
* Retiree Related steps in Termination, Add Retiree Status, and Onboarding Business Processes will now route to the Benefits Partner instead of the Retiree Partner

## Upcoming Changes

* Administrative Correction Events will not reprocess other events except in cases of perceived changes to benefits eligibility (ex: change in benefit group)
* Add To Do in Leave Request for Bereavement (Pending HAC Approval)
* Add Approval Step in Change Benefits for events triggered by employees in SGIP Wait (Pending HAC Approval)

## Discussion Items

### Updates to Total Rewards Statement Design

* Overview of timeline for coming changes
* Existing language will be reviewed and updated as needed
* Layout has been updated by Workday to be easier to understand and includes more information
* New task will be added through the Benefits & Pay hub to print the total rewards statement.

### Add Validation to Change Benefits for Beneficiaries

* If an employee elects life insurance coverages, a soft warning would trigger if a beneficiary is not elected
* Add a To Do to remind employee to check with other vendors if the beneficiaries are different. Add link to SBA site with retirement pages
* Possible to re-enable the link beneficiary and dependent
	+ Problem with Emergency Contact & Dependent information updating unintentionally
* Create a report in Workday for missing beneficiaries.

### Add To Do if Beneficiary is Updated

* A reminder to employees who are updating their beneficiaries to update beneficiaries to other coverages not managed in Workday (ex: TRS)

### Approval Step in Change Benefits for Employees in SGIP

* Should the condition also include employees who are enrolled prior to SGIP or Returning to Retire Retirees in SGIP Wait
* Currently validation prevents creation only for *employees* in SGIP Wait
* New Approval Step will trigger if
	+ Employee/Retiree triggers event
	+ SGIP Date is in the future
	+ Event is not Birth/Adoption, Marriage, Marriage for Retirees
* Endorsement Requested

### Improve Validation for Organization for Billing

* Propose enhancement to the Org for Billing validation to help prevent incorrect IDs
* Current validation very limited
* Create new soft alert if combination is unexpected (EX: T\_0200000)

### Apply Retiree SGIP to Other Coverages

* Proposing new benefit event type for retirees opting out of medical outside of OE
* Allows retirees currently enrolled in medical and dental or vision who are opting out of medical can move into employer paid dental or vision plans.
* This has been a rare occurrence
* Confirm with SBA: Can SGIP be applied to other coverages outside of Open Enrollment?
* Investigate number of changes to determine necessity of creating separate event type to gain other coverage.

### Daily Reminders for Benefit Events due in 7 Days

* Currently no reminders are sent for events that only have 7 day enrollment window.
* Propose daily reminder at 3 days for employees who have unsubmitted benefit events.
* Endorsement Requested

### Add To Do in Leave Request for Bereavement

* Propose to do sent to benefits partners when there is a leave request for reason of death of a family member
* At the end of the Leave process
* Endorsement Requested

### August & September Hires for Open Enrollment

* Falls into 2 groups: People starting benefits before 9/1 and People waiting until 9/1 to begin coverage
* If the August or September hires are excluded from Open Enrollment, Alternate OE events for employees who begin benefits prior to 9/1 will have to be triggered.
* Concerns about workload of manually launching benefit events for August hires
* Research possibility of Passive Event or To Do in Hire
* Proposal to only exclude Full Time Monthly/Full Time Biweekly
* Update OE Discrepancy to include Part Time and Full Time Monthly and Bi-Weekly

### Calendar Plan Year

* Over 2100 Open Enrollment events needed to be relaunched in 2024
* Considerations:
	+ Faculty Contracts begin in September
	+ Fiscal Year/Budget concerns
	+ 12 over 9 would not work as currently implemented

### Mid-Month Retirees

* When a retiree retires mid-month it creates problems
	+ Primary payer for medical coverage changes as soon as retirement date passes
	+ Problems with payroll deductions
* Reminder to council employees what may happen when they choose to retire mid-month.
* Make sure to communicate to employee that they should enroll in Medicare the month prior to their planned retirement date if they plan to retire mid-month

### Add Job and Change Job Events with Benefit Effects

* Create new To Do to remind benefits partners to pay special attention to SGIP Date Driver for Change and Add Job events
* Proposal to create joint committee with Staffing team to address issues with Add and Change Job

## Cross-Functional Items

### Reporting

* Request a new report for Employees with Coverages Missing Beneficiaries

### Staffing

* Form committee to address difficulties in the Add Additional Job and Change Job processes.

## Action Items

* WDS Team Test re-enable dependent/beneficiary linking
* Meredith/Drew Create new report for Missing Beneficiaries on Coverages
* Meredith Discuss Policy with SBA for using SGIP for other coverages outside of Open Enrollment
* WDS Team Investigate number of changes for Retiree Coverage outside of Open Enrollment to determine whether it’s worth creating a separate event
* WDS/Staffing/Working Group form committee to discuss changes to Change/Add Job processes
* Benefits Partners Add Endorsements For
	+ Add Validation to Change Benefits for Beneficiaries
	+ Add To Do when Beneficiary is Updated
	+ Approval Step in Change Benefits for Employees in SGIP Wait
	+ Add To Do in Leave Request for Bereavement

## Next Meeting: 3/19/2025