## Attendees

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| --- | --- | --- |
| Martha Alexander | Alexandra Kelly | Chris Burns |
| Betty Gibson | Janna Johnson | Debbie Morrison |
| Ashley Porson | Ninette Portales | Pattie Toller |
| Hollie Trussell | Vicki Welch | Angelia Alaniz |
| Jennifer Escamilla | Stacey Havel | Jennifer Valdez |
| Irma San Miguel | Helen Torres | Vicky Brinkman |
| Meredith Fox |  |  |

## Announcements & Completed Changes

* Added more visible warning when not re-electing FSA during open enrollment.
* Benefits Partner Dashboard is now available

## Upcoming Changes

* Add Announcements to the Benefits Dashboard
* Open Enrollment; Events with 9/1 benefits start dates will not include correct plans or rates until FY26 updates are loaded.
* Report Alert prior to OE to remind anyone Certifying Other to update their status if needed.

## Discussion Items

### Absence Due to Birth/Adoption & LOA Events in General (HAC)

* HR not notifying Benefits Partners, EE missing 31 day deadline
  + Can we prevent duplicate to do if employee needs to submit multiple leave requests due to exhausting different time off types?
  + What reasons are they using?
    - Sick > Birth/Adoption
    - Unpaid > Parental Leave
    - FMLA
  + Notification or To Do step
    - TAMU/Ag prefer to do over notification to Benefits Partners
    - Also send notification to employee (personal and work email)
    - Option to Opt In/Out for workstations
    - Exclude if there is already a Birth/Adoption benefit event in the last 31 days
    - Way to prevent notification if employee has already submitted leave and received notification (exclude if already submitting time off request type within last 31 days?)

### ORP

* Losing ORP/TRS Eligibility notification/to do
  + Add Step in the Staffing BPs to automatically send a to do if someone is moving out of ORP, send a link to the ORP Eligibility Reference Guide.
  + Possibly separate step if the employee has ORP Vested Date ID (past date)
  + Phase 2: does it need to be added to End Additional Job?
* Notification for expiring ORP enrollment period, HR12 or HR15 needed, etc.
  + There is a notification for unsubmitted ORP events
  + HR 12: Aknowledgement of ORP Offer
    - Send reminder if they have an open ORP event?
    - Tarleton has them submit the form during Onboarding, but would like reminders for them with uncompleted events
    - Can Workday generate this as a document and send to employee (similar to offer letter/hire document acknowledgements)
  + HR15: Terminating Employee sent to vendor to release funds.
    - Currently Benefit Partners receive a To Do reminding them to complete HR15.
  + HR18/HR14: Conditional routing for members based on who is completing form
* HR-15 ORP Acknowledgement Form
  + Update Review Documents Step in Termination to go to fillable PDF instead of the Docx in Workday
  + Possible to have some information pre-populated?
  + Conditional Routing based on who is completing for each member

### Prevent Reprocessing for All Retirement Events

* + Test Do Not Reprocess for all events (prevent even in case of benefit group change)
  + Is there a way to send a to do if an event is reprocessed?

### Onboarding Question Project

* Creating Committee to address optimization and refresh of Onboarding Questions relating to TRS/ORP and Benefits Elections
* Initial meeting to occur within the next 2 weeks.
* Implementation of changes within the next year.

### Notification/To Do when a hire date is corrected

* Is there any kind of notification sent when there is a correction to Hire affecting benefits?

### Wellness Credits for 12 over 9

* For wellness credits beginning after 9/1, they are not receiving the correct annual credit amount.
* Possible to use report to make 1 time correction on June pay?
* How frequently is this occurring?
* Who is responsible for determining who is owed a refund and who is responsible for making the adjustments to Payroll?

## Cross-Functional Items

### Staffing

* ORP
  + Conditions to Change Job if ORP eligibility change happening
* Onboarding Questions Refresh Project
  + Include a member of staffing team in discussions

### Time/Absence

* Add To Do/Notification when Employee uses Sick > Birth/Adoption, Unpaid > Parental Leave

### Reporting

* Report for 12 over 9 employees beginning wellness mid-year
  + Identify affected employees
  + Calculate refund owed

## Action Items

* LOA Events for Birth/Adoption
  + WDS Discuss options for adding notifications or to do with Absence
  + WDS write Preliminary Text for notification and to do to send to Training team
  + Benefits Partners add comments if interested in Opt In/Out choice
* Prevent Reprocessing for All Retirement Benefit Events
  + WDS research events which are being reprocessed and why.
  + WDS test whether using No Reprocess checkbox prevents reprocessing in case of Benefit Group Change
  + WDS research if To Do or Notification can be sent when event is reprocessed
* ORP
  + WDS research if Review Documents step for Termination BP can be updated to use PDF form on SBA website
* Notification or To Do for Corrected Hire
  + WDS Staffing is researching any existing notifications.
  + WDS Benefits will dig into specific examples provided.
* Mid-year Wellness Credits for 12 over 9
  + WDS Research the number of people affected,
  + WDS Reporting build report to identify individuals and calculate refund

## Next Meeting: 09/17/2025

^July 16 meeting cancelled due to Open Enrollment